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ABSTRACT

Florida Atlantic University College of Education was commissioned by the South Florida Annenberg Challenge to develop and create five diagnostic and assessment instruments for leaders that will provide candidate information about: (1) personality skills related to leadership; (2) transformational leadership potential; (3) leadership skills; (4) written and oral communication skills; and (5) decision-making and task prioritization abilities. The instruments will be used to screen potential administrators. The final products will be on-line, self-administered instruments, and were expected to be completed by February 2003. This report addresses the first phase, an evaluation of existing leadership instruments to determine their applicability and psychometric strengths, by establishing a framework to guide the work and then providing an evaluation of the available assessment instruments for each section of the framework. Approximately 120 available instruments were reviewed. Two instruments, Benchmarks and Dimensions of Leadership Profile (DLP) were able to measure six of the eight leader attributes, but neither measured the attribute of aspiration. The DLP did not measure adaptiveness, and benchmarks was not able to measure attraction. One instrument could measure all four core functions, and four instruments could measure three of four core functions. The findings about the individual instruments are to be used in the development of the assessments for the project. Attachments include: (1) recommendations of the Technical Panel; (2) the third report to the Steering Committee; and (3) an appendix that lists the instruments and presents their profiles. (SLD)

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Aligning Assessment Instruments with the Sterling Quality Criteria: Technical Report for the Teaching and Leadership Center at Florida Atlanta University

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Executive Summary

Prepared by
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Florida Atlantic University College of Education was commissioned by The South Florida Annenberg Challenge to develop and create 5 diagnostic and assessment instruments for leaders that will provide candidates information about (a) personality traits related to leadership, (b) transformational leadership potential, (c) leadership skills, (d) written and oral communication skills, and (e) decision-making and task prioritization abilities. The instruments will be used to screen potential administrators and determine their leadership development needs. The final product will be on-line, self-administered assessment instruments that may be quickly and cost effectively used. The proposed project commenced in February - 2002 and will be completed by February, 2003.

The project is scheduled to be completed in three phases. In the first phase, an evaluation of existing leadership assessment instruments was made to determine their applicability, relevance, appropriateness, and psychometric strengths given the aim of the project. The assessment instruments identified in this report address the leadership domains identified by the Annenberg Challenge in their RFP and listed above. In the second phase, new items will be created based on leadership constructs not assessed by packaged products. The validity and reliability of the items will be established. These constructs and items will enhance the scope of the assessment scheme. In the final phase, all assessments will be placed in electronic form and pilot-tested prior to delivery to the South Florida Annenberg Challenge.

This report addresses the first phase of the project by establishing a framework to guide the work and then providing an evaluation of the available assessment instruments on the market for each section of the framework. The underlying constructs of leadership were abstracted from the leadership literature in business, education and psychology. The constructs were categorized by (a) attributes of leaders, (b) core functions, (c) core processes, and (d) core strategies. This classification was used to categorize the qualities and skills measured by each of the 120 assessment instruments of publicly available instruments that are primarily self-rating instruments. The instruments have in common an assessment-for-development focus, a scaling method that permits assessment along a continuum and sound psychometric properties. Several factors were used to evaluate the instruments: (a) cost of use; (b) type of response scale and length of instrument; (c) psychometric properties; (d) ease of scoring; (f) ability to administer on-line; and, (g) fidelity with the leadership areas to be assessed. Brief summaries of these instruments and development aspects appear in the appendices of the full report.

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Leader Attributes. Forty instruments instruments were identified to measure some of the leader attributes of aspiration, adaptiveness, attraction, assertiveness, character, confidence, connection, competence. Two instruments, Benchmarks and Dimensions of Leadership Profile, were able to measure 6 of the 8 leader attributes. Executive Success Profile was able to measure 4 of the 8 attributes. The remaining 37 instruments were able to measure fewer than 3 attributes.

Core Functions. Twenty six instruments were identified to measure some the core functions of planning, organizing, allocating and monitoring. One instrument - the Management Practice Inventory - was capable of measuring all 4 functions. Four instruments were capable of measuring 3 functions – Leatherman Leadership Questionnaire, Management Behavior Assessment Test, Management Practices Survey, and the Profiler. The remaining 21 instruments were able to measure fewer than 2 functions.

Core Processes. Thirty seven instruments were identified to measure some of the core processes of problem solving, decision making, communicating, motivating and conflict management. One instrument, Leatherman Leadership Questionnaire was capable of measuring all 5 core processes. One instrument, Supervisory Skills Inventory, was capable of measuring 4 of the 5 core processes. The remaining 35 instruments were able to measure fewer than 3 core processes.

Core Strategies. Forty eight instruments were identified to measure some of the core strategies of determining direction, creating coherent instructional programs, building organizational capacity, and establishing continuous improvement and accountability. Three instruments, Leadership Report, Leadership Strategies Inventory, Multi-Factor Leadership Questionnaire, were capable of measuring all 4 core strategies. Four instruments - Instructional Leadership Inventory, Management Behavior Assessment Test, Survey of Executive Leadership, and the Survey of Leadership Practices - were capable of measuring 3 of the four core strategies. The remaining 41 instruments were able to measure fewer than 3 core strategies.

Conclusion. Two instruments, Benchmarks and Dimensions of Leadership Profile (DLP), were able to measure 6 of the 8 **leader attributes**. In both cases the attribute of aspiration was left unmeasureable by the instruments. Additionally, the DLP was unable to measure adaptiveness and Benchmarks was unable to measure attraction but was able to measure connection which is a closely associated attribute.

One instrument - the Management Practice Inventory - was capable of measuring all 4 **core functions**. Four instruments were capable of measuring 3 of the 4 core functions – Leatherman Leadership Questionnaire (LLQ), Management Behavior Assessment Test (MBAT), Management Practices Survey, and the Profiler. LLQ was unable to measure the allocating function.

One instrument, Leatherman Leadership Questionnaire was capable of measuring all 5 core processes. One instrument, Supervisory Skills Inventory, was capable of measuring 4 of the 5 core processes.

Three instruments, Leadership Report, Leadership Strategies Inventory, Multi-Factor Leadership Questionnaire, were capable of measuring all 4 core strategies. Four instruments - Instructional Leadership Inventory, Management Behavior Assessment Test, Survey of Executive Leadership, and the Survey of Leadership Practices - were capable of measuring 3 of the four core strategies.

Recommendation. The research team recommends that we present the findings of this first review to the project's technical panel to confirm our analyses and to identify more instruments which are available commercially such as the NASSP Assessment, the ISLLC standards instruments as well as Personnel Decisions International and Motorola University to assess their ability to assess the attributes and core functions, processes and strategies. Upon review of the technical panel, prices will be established and a recommendation will be made to adopt, adapt and/or develop the assessments needed to meet the charge of the South Florida Annenberg Challenge.

Diagnostic and Assessment Center – Phase 1: Instrumentation Assessment
Report to the Steering committee

INTRODUCTION

Leaders are the key ingredients to successful organizations. Good leaders set an overall organizational tone of character, competence and confidence. They make a difference in organizational efficiency and effectiveness. An optimistic spirit usually pervades organizations where leaders are skilled, optimistic and honest. In contrast, less productive environments result where leaders are incompetent, mean spirited, or unethical, a less productive atmosphere (Campbell, 1991).

Leadership, when defined broadly, is the process of influencing one or more individuals in an attempt to affect their choices of goals, and to inspire, organize or direct their efforts to achieve the goals. Essentially, it is the ability to see a problem or opportunity and do something about it, with other people.

Researchers have described leadership in multifaceted behavioral, sociological, and cognitive terms. Some scholars see it in psychological terms and believe it is an inherited capacity. Others scholars think of leadership in behavioral terms, many of which can be learned. They focus of goal attainment, group process, personality and its effects and actions to induce compliance. They describe leadership as a combination of skills and observable behaviors, such as such as initiating consideration and structure (Hemphil, 1949; Fiedler, 1974, Stogdill, 1974, Yukl, 1989, Bass, 1990); employee and job centered (Blake and Mouton, 1989), task and relationships (Hershey & Blanchard, 1988). Some behavioralist view leadership as situational (Fiedler, 1967; Hershey & Blanchard, 1988). While other behavrioists believe there is one best way to lead (Blake & Mouton, 1989). Then, there are other scholars see leadership as a sociological process underscored with uses of power, authority, conflict, and transactions (Burns, 1978). More recently scholars have used these behavioral or sociological underpinnings to identify leadership as transformational (Burns, 1978), (Bennis & Nanus, 1985; Kouzes and Posner, 1990; Deal & Peterson, 1990). McGregor Burns (1978), who introduced us to the terms transformational and transactional leadership, defines leadership as the ability to ▒. . . induce followers to act for certain goals that represents the values, and the motivations -- the wants and needs, the aspirations and expectations -- of both leaders and followers.▒ Guthrie and Reed▒s (1991) definition also supports the transformational nature of leadership when they described it as, ▒. . . that quality which enables an individual within a given setting to establish an organizational vision, to motivate and inspire others to embrace that vision and achieve and maintain organizational and individual goals.▒▒▒▒Recently, transformational leadership has been described in cognitive terms (Senge, 1990; Gardner, 1995).

LEADERSHIP CONSTRUCTS

The four components of leadership found in Figure 1 represent the key underlying elements necessary for leadership. Leader attributes refers to characteristics and values of the leader themselves. Core functions and processes refers to the basic managerial and interpersonal skills which undergird leader's who can effect positive change. Finally, the core strategies represent the key elements in creating effective and sustainable organizations.

THE UNDERLYING CONSTRUCTS OF LEADERSHIP

ATTRIBUTES	CORE PROCESSES	CORE FUNCTIONS	CORE SKILLS	CORE STRATEGIES
Aspiration	Decision Making	Planning	Reframing	Developing a Strategic Mindset and Organizational Direction
Adaptive	Communicating	Organizing		Creating Coherent Instructional System
Attraction				
Assertiveness	Motivating	Allocating	Reflection	Building Organizational Capacity and Culture
Character				
Confidence	Conflict Management	Monitoring	Systems Thinking	Establishing a Continuous Improvement and Accountability System
Connection				
Competence				

MANAGERIAL ⟶ TRANSFORMATIONAL

Pisapia, J. (in press). Strategic Leadership.

Figure 1. The Underlying Elements Necessary for Leadership

ANALYSIS

LEADER CHARACTERISTICS AND TRAITS

The early literature on leadership presented the perspective that leaders possess certain personal characteristics which made them more likely to become leaders, and more effective when they assumed a leadership role. This emphasis has become known as the trait theory of leadership. The popular notion is that possession of certain psychological traits related to flexibility and adaptability affects a leaders ability to deal with change and influences their ability and willingness to transform their organizations.

Researchers have taken three approaches to identify "natural" leader traits that determine the leader's capacity to lead. First, they studied leaders and their traits in order to predict potential and success. In the second approach, they studied the observations of followers of successful leaders. The third approach is the delineation of skills successful leaders display.

Although the studies were able to detect important characteristics, they are not conclusive. As an example, Williams and Wasenaar (1991) concluded that their review with "Personality traits, such as intelligence, adjustment, dominance, sensitivity, and masculinity do not seem to hold the answer to the question, What makes a successful leader?" There are, however, reliable studies that point to attributes, habits and skills which are considered central to understanding leader capacity:

Several character traits tend to emerge when investigating leadership qualities - high intelligence, an excellent communicator, charismatic personality (Patterson, 1994). However, these traits are not evident in every leader in each case. Csoka (1974) found that the relationship between leaders intelligence and performance to be consistently low. Others, who found more evidence to suggest a stronger relationship are more optimistic. Williams and Wasenaar (1991, p. 1) concluded that leaders, on average, tend to be slightly more intelligent than non leaders. They go on to say however, that "Even this finding, however, was not without significant exceptions." Then, there are those who see intelligence as a more important attribute in future leaders than leaders of the past. Thomas Cronin, (1993, p. 22) says,

> Leaders today have to learn how to thread or weave together disparate parts and move beyond analytical to integrative thinking. This will require well-read, well-traveled persons who can rise above their specialities and their professions. It will require as well persons who are not afraid of politics, but who rather view the art of politics as the art of bringing about the difficult and the desirable.

LEADER ATTRIBUTES

There is a greater consensus that some combination of the attributes of aspirations, assertiveness, adaptation, and attraction (described in Figure 2) are consistently found in leaders:

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Leader Attributes

QUALITIES	CREDIBILITY
ASPIRATION Ambitious, desire to excel, achieve, forceful, competitive, (Gardner, 1989; Stogdill, 1974; Campbell, 1991). Desire to actively participate in events. Need to achieve in all activities attempted (NASSP, 1990). Work is important to personal satisfaction; ability to be self-policing, accept responsibility; Primacy of work and inner work standards (AT&T; NASSP, 1990; Gardner, 1989)	**CHARACTER** Credible (candid, trustworthy, honest); Organized, (orderly), Productive, (dependable, effective); Consistent, integrity) (Campbell, 1991; Kouzes & Posner, 1990; Blase, 1987; DePree, 1989). Courage over time, resolution, and steadiness. Willingness to risk again and again (Gardner, 1989). Cherishes diversity (DePree, 1989). Thrifty (frugal, not extravagant) (Campbell, 1991).
ASSERTIVENESS *Initiative*: self-starting behavior rather than passive acceptance; persistence, aggressiveness (Stogdill, 1974). Possession of a strong impulse to take charge (Gardner, 1989). *Daring*, (adventuresome, risk-taking); enterprising, (impressive, resourceful) (Campbell, 1991). *Dominance:* Take action and get results in the face of trying circumstances; able to overcome resistance, strengthen followers, and produce effective action (Mitchell & Tucker, 1992; Gardner, 1989; Gorton & Snowden, 1993). *Competitive*, (Argyris, 1973); Capacity to win and hold trust (Gardner, 1989); Willingness to confront authority (Gardner, 1995).	**COMPETENCE** *Competent* to discuss a variety of subjects - educational, political, i.e., current events, economic. Possession of a well-reasoned educational philosophy (NASSP, 1990). *Capable* and effective, and functionally and technically competent (Kouzes & Posner, 1990). *Knowledge*, intelligence (Stogdill, 1974; AT&T). Intimate with the organization and its work (DePree, 1989). The knowledge of the whole system over which they preside, its mission, and the environment in which it functions (Gardner, 1989).
ADAPTIVE Adaptability and flexibility of approach (Gardner, 1989; Stogdill, 1974; Campbell, 1991; Krupp, 1994). Receptiveness to new ideas and change (NASSP, 1990). Tolerance of uncertainty and resistance to stress (AT&T). The ability to perform under pressure and during opposition; think on one's feet; confronted by physically and mentally demanding tasks and still accomplish the mission using good interpersonal skills. (NASSP, 1990). Function well under prolonged stress and to survive defeat and keep going (Gardner, 1989).	**CONFIDENCE** Confidence is required to take the risks, handle the criticisms, and hostility that leaders must absorb (Gardner, 1989). Self confidence (Stogdill, 1974). Dynamic, (enthusiastic, inspiring). Energy, (active, healthy); resilient (calm, optimistic, trusting) (Campbell, 1991) Leaders are able to see a broad picture (Sergiovanni, et Al. 1992; DePree, 1989 Kouzes and Posner, 1990; Campbell, 1991). Concerned with organization's future, a sense of direction, and how to set it (Kouzes and Posner, 1990). Original, (creative, imaginative) (Campbell, 1991; Stogdill, 1974).
ATTRACTION Sociable, affable, emotional not aloof; Entertaining, extraverted, humorous; Friendly, cheerful, likable; Considerate, helpful, cooperative; (Campbell, 1991; Stogdill, 1974) Accessible (Blase, 1987).	**CONNECTION** Able to inspire and strengthen follower confidence in visions and goals. Capable of moving people to action, encourage them to get involved. (Gardner, 1989; Kouzes & Posner, 1990). Communicates persuasively. Articulate. Ability to challenge, inspire, enable, and encourage able to strengthen the confidence of followers (Kouzes & Posner, 1990; (Argyris, 1973).). Tells why rather than how (DePree, 1989). Leaders are realistic. They communicate honestly with their staff; encouraging them to face reality and providing them with support in confronting difficult issues (Krupp, 1994).

Pisapia, J. (in press). Strategic Leadership.

Figure 2. Attributes of Leaders from the Perspective of Leaders and Followers

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Aspiration – Leaders are ambitious and need to achieve play important roles in the leader's aspiration to excel. Those with high aspiration levels want to actively participate in events, are competitive and forceful. They give evidence that work is import to their personal satisfaction. Not only do they display a need to achieve but also a willingness to accept responsibility and will be intrinsically motivated and self-policing. They set high standards for themselves without demanding perfection. Successful leaders have an inner impulse to leave their "thumbprint" on events (Gardner, 1989).

Assertiveness - Leaders assert themselves. They express their thoughts and take control of decisions rather than letting others control them. They are willing to confront authority (this trait often appears at an early age; Gardner, 1995). Many times as they ponder the issues and people involved in specific leadership positions or acts. They believe that they are as well motivated and perhaps more likely to be effective than the person currently in the position. They think, "I can do it better!" They have a strong impulse to take charge and get results in the face of trying and sometimes complex circumstances. They are "can, and will do" people. They display initiative, persistence, assertiveness. They are "self-starters." They understand the need for power, authority and influence and how to use them to overcome resistance.

Adaptive. - Leaders are flexible. They are receptive to new ideas and change. They generally believe every problem has several solutions and approaches to the solutions. They understand the need to modify their behavior, change their perceptions and come up with new answers. They seek many options. They have a tolerance for ambiguity. "Growth and change are often messy." (Sergiovanni, Burlingame, Coombs, & Thurston, 1992). They have the ability to listen and find ways to say "yes" frequently and "no" infrequently. They have the ability to do without constant approval and recognition from others (Bennis & Nanus, 1985, p. 67).

Attraction. Leaders draw people toward them. Some of them use their ideas, plans, and passion to attract followers. Others appear to be more extraverted, friendly, likable than those who are average or mediocre (Campbell, 1991). Outstanding leaders are able to combine these two attraction forces, ideas and personality, through a sincere enjoyment of people. They are entertaining to be around, sociable and accessible.

Instead of studying over traits found in outstanding leaders, Kouzes and Posner (1990) turned the coin around and asked followers what traits they thought were important to the credibility their leaders. They asked more than 10,000 managers to tell them what they look for or admire in people they are willing to follow. These managers told them, they look for leaders who are honest, competent, forward-looking and inspiring.

Character. In the Kouzes and Posner study, honesty was selected more often than any other leadership characteristic. Leaders are honest when they do what they say they are going to do. Lack of follow-through, promises not kept, and inconsistencies between word and deeds suggest that the leader is not honest. Leaders are consistent and dependable. They are courageous, and display a willingness to risk over and over again, survive defeat and keep going. They have integrity. Basically, people judge their character and ethical practices to decide whether or not an individual is worthy of trust. To have character, is not to be the perpetual pendulum moving forward and backward with the end of a cycle or a shove in the opposite direction. To have character, the individual must possess core values, loyalties and convictions which serve as bases of judgment and standards of action. As Bolman and Deal (1994) avow, "The heart of leadership is in the hearts of leaders. You have to lead from something deep in your heart."

Competence. Followers must believe that the leader is competent, capable and effective. Knowledgeable school leaders are able to discuss a variety of issues they face with understanding. They are intimate with their schools and its work. Successful leaders bring more than functional and technical competence to their position. From the Kouzes and Posner study, it was also evident that the types of competence followers look for differs according to the condition of the organization and the rank of the leader. For instance, followers look for competence in policy making and strategic planning at the upper ranks of the organization. The closer the leader is to the technical core of the organization where the work is conducted, the more followers look for competence in the technical areas. As a general guide, although school leaders must be technically competent in the fundamentals of teaching and learning, but functionally, they must also have the ability to challenge, inspire, enable and encourage. School leaders should not only have a good idea of what to do but how to make it happen to be viewed as competent.

Confidence. The third most frequent attribute followers seek in leaders is a forward-looking vision. They expect the leader to be concerned about the organizations future and have a sense of how to set a desirable destination for the organization. They are able to see the broad picture. The confidence of the leader emanates from a sense of direction. This confidence provides a spirit of optimism for the organization and inspires self confidence on the part of followers.

Connection. Finally, it is not enough to know in what direction to move the organization, followers value leaders who connect with them. Successful leaders create an emotional connection between them and their followers. Successful leaders can communicate the direction in ways that encourage

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> followers to get involved, to reframe their thinking, to reorient their energy. They have the capacity to move people to action, to communicate persuasively, and to strengthen the confidence of followers (Gardner, 1989).
>
> Some have termed this quality as the 'inspirational quotient." To frame the quality this way however, is controversial. On the one hand, there are those potential followers who because of experiences do not trust inspirational leaders. On the other hand, many leaders dismiss the quality as unnecessary. They point to examples of successful leaders such as Ghandi who was quiet and unspectacular. Yet, whatever their outward style, leaders must inspire follower confidence in the validity of the goal. The leader's inspirational message is transmitted through three themes: (1) here are the goals which are true and right and which we share, (2) here is how we can reach them, (3) we are strong and capable, and able to accomplish these goals. The connection is solidified through the leader's enthusiasm and excitement which signals a personal commitment and passion to the cause to potential followers.

There are limits to the usefulness of the trait approach, even though the research on leaders suggests they do indeed exhibit attributes of personality, habits, and skills which are important factors when determining success. A social scientist, Edwin Hollander (1967) explained the limitations of the trait approach in the following paragraph:

> The largest deficiency in the trait approach was its insistence upon looking for stable features of "leaders" across many situations. Again this is not the same as studying "leadership" as a process. At any rate, the trait approach failed to recognize that leadership involves a network of relationships with other individuals who are engaged in a situation with a focal activity.

INSTRUMENT ANALYSIS

We reviewed 120 publicly available instruments that are primarily self-rating instruments to determine if they can measure the leader attributes. These instruments also have in common an assessment-for-development focus, a scaling method that permits assessment along a continuum and sound psychometric properties. Several factors were used to evaluate the instruments: (a) cost of use; (b) type of response scale and length of instrument; (c) psychometric properties; (d) ease of scoring; (f) ability to administer on-line; and, (g) fidelity with the leadership areas (attributes, processes, and functions) to be assessed.

Forty of the instruments were identified to measure some of the leader attributes of aspiration, adaptiveness, attraction, assertiveness, character, confidence, connection, competence. These forty instruments are identified in Table 1.Two instruments, Benchmarks and Dimensions of Leadership Profile, were able to measure 6 of the 8 leader attributes. Executive Success Profile was able to measure 4 of the 8 attributes. The remaining 37 instruments were able to measure fewer than 3 attributes.

Table 1: Leadership Attributes by Assessment Instrument

INSTRUMENT	CHARACTERISTIC				CREDIBILITY			
	Aspiration	Adaptive	Attraction	Assertiveness	Character	Confidence	Connection	Competence
Acumen Leadership Skills								X
Acumen Leadership Workstyles					X			
Administrative Stress Index		X						
Benchmarks		X		X	X	X	X	X
Big Five Locator			X				X	
Campbell Leadership Index	X	X			X			
Compass: Managerial Practices Survey				X				
Critical Thinking Test								X
Denison Leadership Development Survey							X	
Developing the Leader Within	X					X		
Diagnostic Assessment of School and Principal Effectiveness					X			
Dimensions of Leadership Profile			X	X	X	X	X	X
Executive Success Profile	X		X		X		X	
Five Star Supervisor Leadership Skills Inventory					X		X	

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INSTRUMENT	CHARACTERISTIC				CREDIBILITY			
	Aspiration	Adaptive	Attraction	Assertiveness	Character	Confidence	Connection	Competence
Fundamental Interpersonal Relations Orientation: Behavior							X	
Leader Adaptability and Style Inventory					X			
The Leadership and Management of Schools	X							
Leadership Assessment Instrument								X
Leadership Behavior Analysis II		X						X
Leadership Behavior D Questionnaire								
Leadership Behavior Questionnaire	X				X			X
Leadership Effectiveness Analysis	X							
Leadership Practices Inventory-2nd								X
Leadership Skills Assessment				X				X
Leadership Skills Inventory	X							
Leadership Strategies Inventory	X							
Leadership Trait Questionnaire					X	X		
Least Preferred Co-Worker Measure							X	
LMX 7					X			
Management Practices Survey							X	

INSTRUMENT	CHARACTERISTIC				CREDIBILITY			
	Aspiration	Adaptive	Attraction	Assertiveness	Character	Confidence	Connection	Competence
Manager View / 360	X							
Matrix: The Influence Behavior Quest.				X			X	
Management Effectiveness Profile System					X			
NEO – PI - R				X		X		
Path/Goal Leadership Questionnaire					X			
The Profiler	X	X		X	X	X		
Prospector	X			X	X			
Survey of Executive Leadership								
Survey of Leadership Practices	X			X				
Survey of Management Practices	X				X			
System for Multi-Level Observation of Groups		X						
VOICES		X		X	X			

CONCLUSION

Two instruments, Benchmarks and Dimensions of Leadership Profile (DLP), were able to measure 6 of the 8 **leader attributes**. In both cases the attribute of aspiration was left immeasurable by the instruments. Additionally, the DLP was unable to measure adaptiveness and Benchmarks was unable to measure attraction but was able to measure connection which is a closely associated attribute.

The top instruments identified for further analysis were (a) Benchmarks, (b) Dimensions of Leadership Profile, (c) Leadership Skills Test, (d) Omnia Profile, (e) Survey of Leadership Practices, (f) Survey of Management Practices, and (g) NEO – PI-R. Table 2 illustrates information about the cost, length, scoring process, on-line capability, and psychometric properties of these selected instruments

--Table 2 here--

Table 2: Preliminary Instrument Analysis – Leadership Attributes

ATTRIBUTES							
Instrument	**Cost**	**Length**	**Scoring Process**	**on-line**	**Validity**	**Reliability**	**Comments**
Benchmarks **(Bench)**	$275 includes survey and developmental learning guide	171 items based on 5-point rating scale 30 minutes to complete 22 scales broken into 2 major sections: managerial skills and perspectives (106 items) and Potential Flaws (26 items) 360-degree anaylsis	Vendor and self-scored	√	High predictive validity	Test-retest (.62 - .87) Internal Consistency (section 1: .75. - .97) (section 2: .70 - .92)	Resourcefulness (17) Doing Whatever it Takes (14) Quick Study (4) Decisiveness (4) Leading Employees (13) Setting a Developmental Climate (5) Confronting Problem Employees (4) Work Team Orientation (4) Hiring Talented Staff (3) Building and Mending Relationships (11) Compassion and Sensitivity (4) Straightforwardness and Composure (6) Balance Between Personal Life and Work (4) Self-awareness (4) Putting People at Ease (4) Acting with Flexibility (5)
Dimensions of Leadership Profile **(DLP)**	$15.50	12 items	Self-scored			Internal Consistency (.55 - .98)	Integrity Self-renewal Fortitude Perceiving Judgment Performing Boldness Team building Collaboration Inspiring Serving Enthusiasm

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Instrument	Cost	Length	Scoring Process	on-line	Validity	Reliability	Comments
Leadership Skills Test **(LST)**	$69	40 comparison sets measuring 10 skill dimensions	15-20 minutes to complete Self-administered and self-scored	—	—	—	Coaching Communicating Empowering Facilitating Influencing Managing change Managing projects Servicing customers Solution finding Team building
Omnia Profile **(OP)**	$250	360-degree analysis		√			Good professional practice Decision making Providing individual support Holding high performance expectations Development of vision and goals
Survey of Leadership Practices **(SLP)**	~$105 per survey, including scoring and feedback report	85 items and 3 open-ended questions completed in 25-30 minutes (open architecture) 360-degree analysis	Self-scored, vender, and self-score software		high	Internal Consistency (.67 - .93 Interrater (.78 - .96)	Vision Risk taking Organizational sensitivity Encouraging participation Teaming Persuasiveness Feedback Energy Perseverance Sharing credit Effectiveness Coping with stress Trustworthiness Source of power
Survey of Management Practices **(SMP)**	~$105 per survey, including scoring and feedback report	145 items completed in 25-30 minutes (open architecture) 360-degree analysis	Self-scored, vender, and self-score software			Internal Consistency (.77 - .98) Interrater (90 - .93)	Clarity of goals and objectives Planning Problem solving Facilitating work of others Exercising positive control Approachability Teambuilding Interested in subordinates' growth Work involvement Opportunity for growth

Instrument	Cost	Length	Scoring Process	on-line	Validity	Reliability	Comments
NEO – PI –R **(NEO)**	$190.00 Kit includes manual, 10 reusable Form S test booklets, 10 Form R test	240-items on 5 point scale	Hand-scored or machine-scored	√	Validated against other personality inventories Construct validity	N .92 E .89 O .87 A .86 C .90	Measures only 2/8 attributes: Assertiveness Confidence

CORE COMPETENCE: PROCESSES AND FUNCTIONS

In addition to the conceptualization of these leader attributes, several organizations charged with training school leaders, such as the National Association of Secondary School Principals (NASSP) also described the traits of successful leaders from a skill framework. They initially used the framework to identify individuals with skills to succeed as a school principal. Currently, this framework is also being used to assess potential school principals, identify strengths and weaknesses, and prescribe developmental opportunities for principal candidates.

The notion of assessment began in the early 1900s by German psychologists trying to identify potential military officers. The practice was discarded after World War II. However, in 1956 the American Telephone and Telegraph (AT&T) company reintroduced the notion of skill assessment with studies of their executives. The AT&T study formed the foundation for other efforts to study executive traits including those initiated by NASSP in the educational field and the Center for Creative Leadership's "Looking Glass" in the business field. The instruments used by each of the three efforts were validated in a similar manner. In the NASSP model a review of the trait literature was conducted followed by tasks analyses of school principals. The measures the scale incorporated and the process used was validated by researchers from Michigan State University in 1983. It has been successfully use to identify principals since then.

Competent leaders exhibit several important skills which provide the confidence and competence which are an important source of their credibility. Followers want leaders who not only know what to do but how to do it. The core processes of decision making, problem solving, communication, conflict management, and motivating underly managerial and transformational leadership skills. The core functions and processes identified in Figure 1 captures the types of skills which lead to competence and support the leadership framework through its delineation of (1) the core functions of planning, organizing, allocating, and monitoring, (2) the continuous process skills of problem solving, decision making, and communications, and (3) the mediating process skills of motivating and conflict management. These core competence skills (identified in Figure 3) are used to support both the management functions and the transformational change functions of leaders.

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CONTINUOUS PROCESS SKILLS
Able to get others involved in solving problems (NASSP, 1990).

Able to seek out relevant data and analyze complex information to decide the important elements of a problem situation; searching for information with a purpose (NASSP, 1990).

Able to reach logical conclusions and make high quality decisions based on available information; skill in identifying educational needs and setting priorities; ability to evaluate critically written communications (NASSP, 1990).

Able to combine hard data, questionable data, and intuitive guesses to arrive at a conclusion that events prove to be correct (Gardner, 1989).

Able to recognize when a decision is required (disregarding the quality of the decision) and to act quickly (NASSP, 1990).

Know what information to communicate and to whom (NASSP, 1990). Able to make clear oral presentation of facts or ideas (NASSP, 1990). Communicates easily at all levels. Spokesperson and diplomat. Able to express ideas clearly in writing; to write appropriately for different audiences - students, teachers, parents, etc. (NASSP, 1990).

MEDIATING PROCESS SKILLS
Able to motivate - Leaders provide visionary inspiration, motivation and direction setting. Understanding attitudes and needs of followers. Skill in dealing with people (Gardner, 1989; NASSP, 1990).

Able to resolve conflicts; tact in dealing with persons from different backgrounds; ability to deal effectively with people concerning emotional issues NASSP, 1990).

CORE FUNCTION SKILLS
Able to establish a course of action for self or others to accomplish a specific goal; to plan, schedule, and control the work of others (NASSP, 1990; AT&T).

Capacity to manage, decide and set priorities. Able to allocate responsibilities, and resources (Gardner, 1989). Skill in using resources in an optimal fashion (NASSP, 1990; AT&T).

Able to establish procedures to monitor and regulate processes, tasks, job activities and responsibilities (NASSP, 1990).

Figure 3. Leadership Core Competence Requirements

INSTRUMENT ANALYSIS

The skills identified on these three scales are found in Tables 3 and 5 which identify the core functions and core processes and the instruments which are able to provide reflective information to the leaders. Table 3 describes the ability of 37 of 120 instruments to measure the core processes.

Twenty-six instruments were identified to measure some the core functions of planning, organizing, allocating and monitoring. One instrument - the Management Practice Inventory - was capable of measuring all 4 functions. Four instruments were capable of measuring 3 functions – Leatherman Leadership Questionnaire, Management Behavior Assessment Test, Management Practices Survey, and the Profiler. The remaining 21 instruments were able to measure fewer than 2 functions.

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Table 3. Core Process Skills by Assessment Instrument

INSTRUMENT	CORE PROCESS SKILLS				
	Problem Solving	Decision Making	Communicating	Motivating	Conflict Management
Administrative Stress Index					X
Benchmarks		X			X
Compass: Managerial Practices Survey	X			X	X
Critical Thinking Test	X				
Decision-Making Inventory		X			
Dimensions of Leadership Profile					X
Fundamental Interpersonal Relations Orientation: Behavior			X		
The Leadership and Management of Schools		X			
Leadership Behavior Questionnaire			X		
Leadership Practices Inventory-2nd				X	
Leadership Skills Assessment		X	X		X
Leadership Skills Inventory	X	X	X		
Leatherman Leadership Questionnaire	X	X	X	X	X
Management Behavior Assessment Test			X		X
Management Practices Inventory		X	X	X	
Management Practices Questionnaire		X	X		X
Management Practices Survey	X		X	X	X
Management Roles Inventory		X	X	X	
Manager View / 360	X		X		
Matrix: The Influence Behavior Quest.				X	X
Management Effectiveness Profile System	X				
Personality Advantage Questionnaire			X	X	
Problem-Solving Skills Questionnaire			X		
The Profiler			X		X

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INSTRUMENT	CORE PROCESS SKILLS				
	Problem Solving	Decision Making	Communicating	Motivating	Conflict Management
Prospector					X
SMT Leader Survey			X		X
School Administrator Skills			X		
Superior Management Practices Questionnaire			X	X	
Supervisory Practices Survey			X	X	
Supervisory Skills Aptitude Test			X	X	
Supervisory Skills Test	X		X	X	X
Supervisory Styles Inventory	X		X	X	
Survey of Leadership Practices					X
Survey of Management Practices	X				
Teamwork			X	X	
Time Management	X	X			
VOICES	X	X			X

CONCLUSION

One instrument, Leatherman Leadership Questionnaire was capable of measuring all 5 **core processes**. One instrument, Supervisory Skills Inventory, was capable of measuring 4 of the 5 core processes.

The top instruments identified for further analysis were (a) COMPASS: Managerial Practices Survey, (b) Leadership Skills Assessment, (c) Leatherman Leadership Questionnaire, (d) Survey of Management Practices, and (e) Supervisory Skills Test. Table 4 illustrates information about the cost, length, scoring process, on-line capability, and psychometric properties of these selected instruments.

--Table 4 here—

Table 4: Preliminary Instrument Analysis-Leadership Processes

Processes							
Instrument	**Cost**	**Length**	**Scoring Process**	**on-line**	**Validity**	**Reliability**	**Comments**
COMPASS: Managerial Practices Survey **(CMPS)**	$295	84 items	Self-scored, vendor scored				
Leadership Skills Assessment **(LSA)**	None	78 items	On-line				
Survey of Management Practices **(SMP)**							

CORE FUNCTIONS

Thirty-seven instruments were identified to measure some of the core processes of problem solving, decision making, communicating, motivating and conflict management (Table 5). One instrument, Leatherman Leadership Questionnaire was capable of measuring all 5 core processes. One instrument, Supervisory Skills Inventory, was capable of measuring 4 of the 5 core processes. The remaining 35 instruments were able to measure fewer than 3 core processes.

Table 5. Leadership Functions by Assessment Instrument

INSTRUMENT	FUNCTION			
	Planning	Organizing	Allocating	Monitoring
Benchmarks				X
Compass: Managerial Practices Survey	X			X
Dimensions of Leadership Profile				X
Leadership Practices Inventory-2nd	X			
Leadership Skills Assessment	X	X		X
Leadership Skills Inventory	X			
Leatherman Leadership Questionnaire	X	X		X
Management Behavior Assessment Test	X	X		X
Management Practices Inventory	X	X	X	X
Management Practices Survey	X	X		X
Matrix: The Influence Behavior Quest.				X
Management Effectiveness Profile System	X	X	X	
The Profiler	X	X		X
Prospector				X
School Administrator Skills		X		
Skills and Attributes Inventory		X		
Styles of Leadership Survey	X			X
Supervisory Skills Aptitude Test	X	X		
Supervisory Skills Test	X			
Supervisory Styles Inventory		X		
Survey of Leadership Practices				X
Survey of Management Practices	X	X		
Taking Your Leadership Temperature	X			
Time Management Inventory	X	X		
Types of Work Index	X			X
The Visionary Leader: Leader Behavior Questionnaire	X	X		

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CONCLUSION

One instrument - the Management Practice Inventory - was capable of measuring all 4 **core functions**. Four instruments were capable of measuring 3 of the 4 core functions – Leatherman Leadership Questionnaire (LLQ), Management Behavior Assessment Test (MBAT), Management Practices Survey, and the Profiler. LLQ was unable to measure the allocating function.

The top instruments identified for further analysis were (a), COMPASS, (b) The Leatherman Leadership Questionnaire, (c) Management Behavior Assessment, (d) Management Practices Survey, and (e) Management Effectiveness Profile System. Table 6 illustrates information about the cost, length, scoring process, on-line capability, and psychometric properties of these selected instruments

--Table 6 here--

Table 6: Preliminary Instrument Analysis- Leadership Functions

Functions							
Instrument	**Cost**	**Length**	**Scoring Process**	**on-line**	**Validity**	**Reliability**	**Comments**
COMPASS **(CMPS)**	$295	84 items	Self-scored, vendor scored				
Leatherman Leadership Questionnaire **(LLQ)**				√			Assigning work Conducting meetings Career counseling Giving positive feedback Coaching Negotiating Oral communication Performance appraisal Managing change Performance standards Employee complaints Persuasion Employee conflicts Making presentations Performance counseling Problem solving Making decisions Selection interviews Delegating Team building Discipline Termination interviews Handling emotional situations Goal setting Time Management Handling grievances One-on-one Training

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Instrument	Cost	Length	Scoring Process	on-line	Validity	Reliability	Comments
Leatherman Leadership Questionnaire (LLQ)	$95/person initial $1000 set-up cost	339 items (2 parts) Total: 3 - 5 hours to complete	On-line Hard-copy report sent	√	Will be needed to be validated…	Internal Consistency: (.90 - .99)	Assigning work Conducting meetings Career counseling Giving positive feedback Coaching Negotiating Oral communication Performance appraisal Managing change Performance standards Employee complaints Persuasion Employee conflicts Making presentations Performance counseling Problem solving Making decisions Selection interviews Delegating Team building Discipline Termination interviews Handling emotional situations Goal setting Time Management Handling grievances One-on-one Training

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CORE STRATEGIES

Forty eight instruments were identified to measure some of the core strategies of determining direction, creating coherent instructional programs, building organizational capacity, and establishing continuous improvement and accountability (Table 7). Three instruments, Leadership Report, Leadership Strategies Inventory, Multi-Factor Leadership Questionnaire, were capable of measuring all 4 core strategies. Four instruments - Instructional Leadership Inventory, Management Behavior Assessment Test, Survey of Executive Leadership, and the Survey of Leadership Practices - were capable of measuring 3 of the four core strategies. The remaining 41 instruments were able to measure fewer than 3 core strategies.

Table 7: Core Strategies by Assessment Instrument

INSTRUMENT	STRATEGIES			
	Developing a strategic mindset and organizational direction	Creating a coherent instructional system	Building organizational capacity and culture	Establishing a continuous improvement and accountability system
Acumen Leadership Skills	X		X	
Benchmarks			X	
Compass: Managerial Practices Survey			X	
Developing the Leader Within			X	X
Dimensions of Leadership Profile	X		X	X
Executive Success Profile	X		X	
Five Star Supervisor Leadership Skills Inventory			X	
Instructional Leadership Inventory	X	X	X	
Leader Adaptability and Style Inventory	X		X	
The Leadership and Management of Schools	X			
Leadership Behavior D Questionnaire	X		X	
Leadership Behavior Questionnaire			X	
Leadership Dimensions Survey	X			
Leadership Effectiveness Analysis	X		X	
Leadership Practices Inventory-2nd				X
Leadership Qualities Scale			X	
Leadership Report	X	X	X	X
Leadership Skills Assessment	X			
Leadership Sphere Inventory				X
Leadership Strategies Inventory	X	X	X	X
Leadership Skills Inventory: Self-Assessment Version			X	
Leatherman Leadership Questionnaire	X		X	
Management Behavior Assessment Test	X		X	X

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INSTRUMENT	STRATEGIES			
	Developing a strategic mindset and organizational direction	Creating a coherent instructional system	Building organizational capacity and culture	Establishing a continuous improvement and accountability system
Matrix: The Influence Behavior Quest.				X
Meyer Kendall Assessment Survey (MKAS)			X	X
Multi-Factor Leadership Questionnaire	X	X	X	X
Organizational Commitment Questionnaire	X		X	
The Profiler	X		X	
Prospector				X
School Administrator Skills			X	
Styles of Leadership Survey	X			
Styles of Management Inventory				
Superior Management Practices Questionnaire	X			X
Supervisory Practices Survey				X
Supervisory Skills Aptitude Test			X	X
Supervisory Skills Test	X		X	
Survey of Executive Leadership	X		X	X
Survey of Leadership Practices	X		X	X
Survey of Management Practices			X	
Team Performance Questionnaire	X			
Teamwork			X	
Time Management Personality Profile				X
Types of Work Index				X
The Visionary Leader: Leader Behavior Questionnaire	X		X	
VOICES	X		X	
Work Commitment Index				X

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CONCLUSION

Three instruments, Leadership Report, Leadership Strategies Inventory, Multi-Factor Leadership Questionnaire, were capable of measuring all 4 **core strategies**. Four instruments - Instructional Leadership Inventory, Management Behavior Assessment Test, Survey of Executive Leadership, and the Survey of Leadership Practices - were capable of measuring 3 of the four core strategies.

The top instruments identified for further analysis were (a), Dimensions of Leadership Profile (b), Leadership Report, (c) Leadership Strategies Inventory, (d) Management Behavior Assessment Test, and (e) The Leadership and Management of Schools. Table 8 illustrates information about the cost, length, scoring process, on-line capability, and psychometric properties of these selected instruments.

--Table 8 here--

Table 8: Preliminary Instrument Analysis – Transformational Skills

Transformational Skills							
Instrument	**Cost**	**Length**	**Scoring Process**	**On-line**	**Validity**	**Reliability**	**Comments**
Dimensions of Leadership Profile **(DLP)**	$15.50	12 items	Self-scored				
Leadership Report **(LR)**							
Leadership Strategies Test **(LST)**		48 items	Self-scored				
Management Behavior Assessment Test **(MBAT)**							
The Leadership and Management of Schools **(LMS)**	none	50 items	Hand-scored				

Instrument	Cost	Length	Scoring Process	on-line	Validity	Reliability	Comments
Management Behavior Assessment Test **(MBAT)**							
Management Practices Survey **(MSP)**							
Management Effectiveness Profile System **(MEPS)**	$125	98 items					

RECOMMENDATIONS

The research team recommends that we present the findings of this first review to the projects technical panel to confirm our analyses and to identify more instruments which are available commercially such as the NASSP Assessment, the ISLLC standards instruments as well as Personnel Decisions International and Motorola University to assess their ability to assess the attributes and core functions, processes and strategies. Upon review of the technical panel, prices will be established and a recommendation will be made to adopt, adapt and/or develop the assessments needed to meet the charge of the South Florida Annenberg Challenge.

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Executive Summary

Prepared by
John Pisapia and
Eleni Coukos-Semmel,
Florida Atlantic University

Florida Atlantic University College of Education was commissioned by The South Florida Annenberg Challenge to develop and create 5 diagnostic and assessment instruments for leaders that will provide candidates information about (a) personality traits related to leadership, (b) transformational leadership potential, (c) leadership skills, (d) written and oral communication skills, and (e) decision-making and task prioritization abilities. The instruments will be used to screen potential administrators and determine their leadership development needs. The final product will be on-line, self-administered assessment instruments that may be quickly and cost effectively used. The proposed project commenced in February - 2002 and will be completed by February, 2003.

The project is scheduled to be completed in three phases. In the first phase, an evaluation of existing leadership assessment instruments was made to determine their applicability, relevance, appropriateness, and psychometric strengths given the aim of the project. The assessment instruments identified in this report address the leadership domains identified by the Annenberg Challenge in their RFP and listed above. In the second phase, new items will be created based on leadership constructs not assessed by packaged products. The validity and reliability of the items will be established. These constructs and items will enhance the scope of the assessment scheme. In the final phase, all assessments will be placed in electronic form and pilot-tested prior to delivery to the South Florida Annenberg Challenge.

This report addresses the first phase of the project by establishing a framework to guide the work and then providing an evaluation of the available assessment instruments on the market for each section of the framework. The underlying constructs of leadership were abstracted from the leadership literature in business, education and psychology. The constructs were categorized by (a) attributes of leaders, (b) core functions, (c) core processes, and (d) core strategies. This classification was used to categorize the qualities and skills measured by each of the 120 assessment instruments of publicly available instruments that are primarily self-rating instruments. The instruments have in common an assessment-for-development focus, a scaling method that permits assessment along a continuum and sound psychometric properties. Several factors were used to evaluate the instruments: (a) cost of use; (b) type of response scale and length of instrument; (c) psychometric properties; (d) ease of scoring; (f) ability to administer on-line; and, (g) fidelity with the leadership areas to be assessed. Brief summaries of these instruments and development aspects appear in the appendices of the full report.

Leader Attributes. Forty instruments instruments were identified to measure some of the leader attributes of aspiration, adaptiveness, attraction, assertiveness, character, confidence, connection, competence. Two instruments, Benchmarks and Dimensions of Leadership Profile, were able to measure 6 of the 8 leader attributes. Executive Success Profile was able to measure 4 of the 8 attributes. The remaining 37 instruments were able to measure fewer than 3 attributes.

Core Functions. Twenty six instruments were identified to measure some the core functions of planning, organizing, allocating and monitoring. One instrument - the Management Practice Inventory - was capable of measuring all 4 functions. Four instruments were capable of measuring 3 functions – Leatherman Leadership Questionnaire, Management Behavior Assessment Test, Management Practices Survey, and the Profiler. The remaining 21 instruments were able to measure fewer than 2 functions.

Core Processes. Thirty seven instruments were identified to measure some of the core processes of problem solving, decision making, communicating, motivating and conflict management. One instrument, Leatherman Leadership Questionnaire was capable of measuring all 5 core processes. One instrument, Supervisory Skills Inventory, was capable of measuring 4 of the 5 core processes. The remaining 35 instruments were able to measure fewer than 3 core processes.

Core Strategies. Forty eight instruments were identified to measure some of the core strategies of determining direction, creating coherent instructional programs, building organizational capacity, and establishing continuous improvement and accountability. Three instruments, Leadership Report, Leadership Strategies Inventory, Multi-Factor Leadership Questionnaire, were capable of measuring all 4 core strategies. Four instruments - Instructional Leadership Inventory, Management Behavior Assessment Test, Survey of Executive Leadership, and the Survey of Leadership Practices - were capable of measuring 3 of the four core strategies. The remaining 41 instruments were able to measure fewer than 3 core strategies.

Conclusion. Two instruments, Benchmarks and Dimensions of Leadership Profile (DLP), were able to measure 6 of the 8 **leader attributes**. In both cases the attribute of aspiration was left unmeasureable by the instruments. Additionally, the DLP was unable to measure adaptiveness and Benchmarks was unable to measure attraction but was able to measure connection which is a closely associated attribute.

One instrument - the Management Practice Inventory - was capable of measuring all 4 **core functions**. Four instruments were capable of measuring 3 of the 4 core functions – Leatherman Leadership Questionnaire (LLQ), Management Behavior Assessment Test (MBAT), Management Practices Survey, and the Profiler. LLQ was unable to measure the allocating function.

One instrument, Leatherman Leadership Questionnaire was capable of measuring all 5 core processes. One instrument, Supervisory Skills Inventory, was capable of measuring 4 of the 5 core processes.

Three instruments, Leadership Report, Leadership Strategies Inventory, Multi-Factor Leadership Questionnaire, were capable of measuring all 4 core strategies. Four instruments - Instructional Leadership Inventory, Management Behavior Assessment Test, Survey of Executive Leadership, and the Survey of Leadership Practices - were capable of measuring 3 of the four core strategies.

Recommendation. The research team recommends that we present the findings of this first review to the project's technical panel to confirm our analyses and to identify more instruments which are available commercially such as the NASSP Assessment, the ISLLC standards instruments as well as Personnel Decisions International and Motorola University to assess their ability to assess the attributes and core functions, processes and strategies. Upon review of the technical panel, prices will be established and a recommendation will be made to adopt, adapt and/or develop the assessments needed to meet the charge of the South Florida Annenberg Challenge.

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Diagnostic and Assessment Center – Phase 1: Instrumentation Assessment Report to the Steering committee

INTRODUCTION

Leaders are the key ingredients to successful organizations. Good leaders set an overall organizational tone of character, competence and confidence. They make a difference in organizational efficiency and effectiveness. An optimistic spirit usually pervades organizations where leaders are skilled, optimistic and honest. In contrast, less productive environments result where leaders are incompetent, mean spirited, or unethical, a less productive atmosphere (Campbell, 1991).

Leadership, when defined broadly, is the process of influencing one or more individuals in an attempt to affect their choices of goals, and to inspire, organize or direct their efforts to achieve the goals. Essentially, it is the ability to see a problem or opportunity and do something about it, with other people.

Researchers have described leadership in multifaceted behavioral, sociological, and cognitive terms. Some scholars see it in psychological terms and believe it is an inherited capacity. Others scholars think of leadership in behavioral terms, many of which can be learned. They focus of goal attainment, group process, personality and its effects and actions to induce compliance. They describe leadership as a combination of skills and observable behaviors, such as such as initiating consideration and structure (Hemphil, 1949; Fiedler, 1974, Stogdill, 1974, Yukl, 1989, Bass, 1990); employee and job centered (Blake and Mouton, 1989), task and relationships (Hershey & Blanchard, 1988). Some behavioralist view leadership as situational (Fiedler, 1967; Hershey & Blanchard, 1988). While other behavrioists believe there is one best way to lead (Blake & Mouton, 1989). Then, there are other scholars see leadership as a sociological process underscored with uses of power, authority, conflict, and transactions (Burns, 1978). More recently scholars have used these behavioral or sociological underpinnings to identify leadership as transformational (Burns, 1978), (Bennis & Nanus, 1985; Kouzes and Posner, 1990; Deal & Peterson, 1990). McGregor Burns (1978), who introduced us to the terms transformational and transactional leadership, defines leadership as the ability to ▒. . . induce followers to act for certain goals that represents the values, and the motivations -- the wants and needs, the aspirations and expectations -- of both leaders and followers.▒ Guthrie and Reed▒s (1991) definition also supports the transformational nature of leadership when they described it as, ▒. . . that quality which enables an individual within a given setting to establish an organizational vision, to motivate and inspire others to embrace that vision and achieve and maintain organizational and individual goals.▒▒Recently, transformational leadership has been described in cognitive terms (Senge, 1990; Gardner, 1995).

LEADERSHIP CONSTRUCTS

The four components of leadership found in Figure 1 represent the key underlying elements necessary for leadership. Leader attributes refers to characteristics and values of the leader themselves. Core functions and processes refers to the basic managerial and interpersonal skills which undergird leader's who can effect positive change. Finally, the core strategies represent the key elements in creating effective and sustainable organizations.

THE UNDERLYING CONSTRUCTS OF LEADERSHIP

ATTRIBUTES	CORE PROCESSES	CORE FUNCTIONS	CORE SKILLS	CORE STRATEGIES
Aspiration	Decision Making	Planning	Reframing	Developing a Strategic Mindset and Organizational Direction
Adaptive Attraction	Communicating	Organizing		Creating Coherent Instructional System
Assertiveness Character	Motivating	Allocating	Reflection	Building Organizational Capacity and Culture
Confidence Connection Competence	Conflict Management	Monitoring	Systems Thinking	Establishing a Continuous Improvement and Accountability System

MANAGERIAL → TRANSFORMATIONAL

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Figure 1. The Underlying Elements Necessary for Leadership

ANALYSIS

LEADER CHARACTERISTICS AND TRAITS

The early literature on leadership presented the perspective that leaders possess certain personal characteristics which made them more likely to become leaders, and more effective when they assumed a leadership role. This emphasis has become known as the trait theory of leadership. The popular notion is that possession of certain psychological traits related to flexibility and adaptability affects a leaders ability to deal with change and influences their ability and willingness to transform their organizations.

Researchers have taken three approaches to identify "natural" leader traits that determine the leader's capacity to lead. First, they studied leaders and their traits in order to predict potential and success. In the second approach, they studied the

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observations of followers of successful leaders. The third approach is the delineation of skills successful leaders display.

Although the studies were able to detect important characteristics, they are not conclusive. As an example, Williams and Wasenaar (1991) concluded that their review with "Personality traits, such as intelligence, adjustment, dominance, sensitivity, and masculinity do not seem to hold the answer to the question, What makes a successful leader?" There are, however, reliable studies that point to attributes, habits and skills which are considered central to understanding leader capacity:

Several character traits tend to emerge when investigating leadership qualities - high intelligence, an excellent communicator, charismatic personality (Patterson, 1994). However, these traits are not evident in every leader in each case. Csoka (1974) found that the relationship between leaders intelligence and performance to be consistently low. Others, who found more evidence to suggest a stronger relationship are more optimistic. Williams and Wasenaar (1991, p. 1) concluded that leaders, on average, tend to be slightly more intelligent than non leaders. They go on to say however, that "Even this finding, however, was not without significant exceptions." Then, there are those who see intelligence as a more important attribute in future leaders than leaders of the past. Thomas Cronin, (1993, p. 22) says,

> Leaders today have to learn how to thread or weave together disparate parts and move beyond analytical to integrative thinking. This will require well-read, well-traveled persons who can rise above their specialities and their professions. It will require as well persons who are not afraid of politics, but who rather view the art of politics as the art of bringing about the difficult and the desirable.

LEADER ATTRIBUTES

There is a greater consensus that some combination of the attributes of aspirations, assertiveness, adaptation, and attraction (described in Figure 2) are consistently found in leaders:

Leader Attributes

QUALITIES

ASPIRATION
Ambitious, desire to excel, achieve, forceful, competitive, (Gardner, 1989; Stogdill, 1974; Campbell, 1991).

Desire to actively participate in events. Need to achieve in all activities attempted (NASSP, 1990).

Work is important to personal satisfaction; ability to be self-policing, accept responsibility; Primacy of work and inner work standards (AT&T; NASSP, 1990; Gardner, 1989)

ASSERTIVENESS
Initiative: self-starting behavior rather than passive acceptance; persistence, aggressiveness (Stogdill, 1974). Possession of a strong impulse to take charge (Gardner, 1989).

Daring, (adventuresome, risk-taking); enterprising, (impressive, resourceful) (Campbell, 1991).

Dominance: Take action and get results in the face of trying circumstances; able to overcome resistance, strengthen followers, and produce effective action (Mitchell & Tucker, 1992; Gardner, 1989; Gorton & Snowden, 1993).

Competitive, (Argyris, 1973); Capacity to win and hold trust (Gardner, 1989); Willingness to confront authority (Gardner, 1995).

ADAPTIVE
Adaptability and flexibility of approach (Gardner, 1989; Stogdill, 1974; Campbell, 1991, Krupp, 1994).

Receptiveness to new ideas and change (NASSP, 1990).

Tolerance of uncertainty and resistance to stress (AT&T). The ability to perform under pressure and during opposition; think on one's feet; confronted by physically and mentally demanding tasks and still accomplish the mission using good interpersonal skills.
(NASSP, 1990). Function well under prolonged stress and to survive defeat and keep going (Gardner, 1989).

ATTRACTION
Sociable, affable, emotional not aloof; Entertaining, extraverted, humorous, Friendly, cheerful, likable, Considerate, helpful, cooperative; (Campbell, 1991; Stogdill, 1974)

Accessible (Blase, 1987).

CREDIBILITY

CHARACTER
Credible (candid, trustworthy, honest); Organized, (orderly), Productive, (dependable, effective), Consistent, integrity) (Campbell, 1991; Kouzes & Posner, 1990; Blase, 1987; DePree, 1989).

Courage over time, resolution, and steadiness. Willingness to risk again and again (Gardner, 1989).

Cherishes diversity (DePree, 1989). Thrifty (frugal, not extravagant) (Campbell, 1991).

COMPETENCE
Competent to discuss a variety of subjects - educational, political, i.e., current events, economic. Possession of a well-reasoned educational philosophy (NASSP, 1990).

Capable and effective, and functionally and technically competent (Kouzes & Posner, 1990).

Knowledge, intelligence (Stogdill, 1974; AT&T). Intimate with the organization and its work (DePree, 1989). The knowledge of the whole system over which they preside, its mission, and the environment in which it functions (Gardner, 1989).

CONFIDENCE
Confidence is required to take the risks, handle the criticisms, and hostility that leaders must absorb (Gardner, 1989). Self confidence (Stogdill, 1974). Dynamic, (enthusiastic, inspiring) Energy, (active, healthy); resilient (calm, optimistic, trusting) (Campbell, 1991)

Leaders are able to see a broad picture (Sergiovanni, et Al 1992; DePree, 1989 Kouzes and Posner, 1990; Campbell, 1991).

Concerned with organization's future, a sense of direction, and how to set it (Kouzes and Posner, 1990).

Original, (creative, imaginative) (Campbell, 1991; Stogdill, 1974).

CONNECTION
Able to inspire and strengthen follower confidence in visions and goals. Capable of moving people to action, encourage them to get involved. (Gardner, 1989; Kouzes & Posner, 1990).

Communicates persuasively. Articulate. Ability to challenge, inspire, enable, and encourage able to strengthen the confidence of followers (Kouzes & Posner, 1990; (Argyris, 1973).). Tells why rather than how (DePree, 1989).

Leaders are realistic. They communicate honestly with their staff; encouraging them to face reality and providing them with support in confronting difficult issues (Krupp, 1994).

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Figure 2. Attributes of Leaders from the Perspective of Leaders and Followers

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Aspiration – Leaders are ambitious and need to achieve play important roles in the leader's aspiration to excel. Those with high aspiration levels want to actively participate in events, are competitive and forceful. They give evidence that work is import to their personal satisfaction. Not only do they display a need to achieve but also a willingness to accept responsibility and will be intrinsically motivated and self-policing. They set high standards for themselves without demanding perfection. Successful leaders have an inner impulse to leave their "thumbprint" on events (Gardner, 1989).

Assertiveness - Leaders assert themselves. They express their thoughts and take control of decisions rather than letting others control them. They are willing to confront authority (this trait often appears at an early age; Gardner, 1995). Many times as they ponder the issues and people involved in specific leadership positions or acts. They believe that they are as well motivated and perhaps more likely to be effective than the person currently in the position. They think, "I can do it better!" They have a strong impulse to take charge and get results in the face of trying and sometimes complex circumstances. They are "can, and will do" people. They display initiative, persistence, assertiveness. They are "self-starters." They understand the need for power, authority and influence and how to use them to overcome resistance.

Adaptive. - Leaders are flexible. They are receptive to new ideas and change. They generally believe every problem has several solutions and approaches to the solutions. They understand the need to modify their behavior, change their perceptions and come up with new answers. They seek many options. They have a tolerance for ambiguity. "Growth and change are often messy." (Sergiovanni, Burlingame, Coombs, & Thurston, 1992). They have the ability to listen and find ways to say "yes" frequently and "no" infrequently. They have the ability to do without constant approval and recognition from others (Bennis & Nanus, 1985, p. 67).

Attraction. Leaders draw people toward them. Some of them use their ideas, plans, and passion to attract followers. Others appear to be more extraverted, friendly, likable than those who are average or mediocre (Campbell, 1991). Outstanding leaders are able to combine these two attraction forces, ideas and personality, through a sincere enjoyment of people. They are entertaining to be around, sociable and accessible.

Instead of studying over traits found in outstanding leaders, Kouzes and Posner (1990) turned the coin around and asked followers what traits they thought were important to the credibility their leaders. They asked more than 10,000 managers to tell them what they look for or admire in people they are willing to follow. These managers told them, they look for leaders who are honest, competent, forward-looking and inspiring.

Character. In the Kouzes and Posner study, honesty was selected more often than any other leadership characteristic. Leaders are honest when they do what they say they are going to do. Lack of follow-through, promises not kept, and inconsistencies between word and deeds suggest that the leader is not honest. Leaders are consistent and dependable. They are courageous, and display a willingness to risk over and over again, survive defeat and keep going. They have integrity. Basically, people judge their character and ethical practices to decide whether or not an individual is worthy of trust. To have character, is not to be the perpetual pendulum moving forward and backward with the end of a cycle or a shove in the opposite direction. To have character, the individual must possess core values, loyalties and convictions which serve as bases of judgment and standards of action. As Bolman and Deal (1994) avow, "The heart of leadership is in the hearts of leaders. You have to lead from something deep in your heart."

Competence. Followers must believe that the leader is competent, capable and effective. Knowledgeable school leaders are able to discuss a variety of issues they face with understanding. They are intimate with their schools and its work. Successful leaders bring more than functional and technical competence to their position. From the Kouzes and Posner study, it was also evident that the types of competence followers look for differs according to the condition of the organization and the rank of the leader. For instance, followers look for competence in policy making and strategic planning at the upper ranks of the organization. The closer the leader is to the technical core of the organization where the work is conducted, the more followers look for competence in the technical areas. As a general guide, although school leaders must be technically competent in the fundamentals of teaching and learning, but functionally, they must also have the ability to challenge, inspire, enable and encourage. School leaders should not only have a good idea of what to do but how to make it happen to be viewed as competent.

Confidence. The third most frequent attribute followers seek in leaders is a forward-looking vision. They expect the leader to be concerned about the organizations future and have a sense of how to set a desirable destination for the organization. They are able to see the broad picture. The confidence of the leader emanates from a sense of direction. This confidence provides a spirit of optimism for the organization and inspires self confidence on the part of followers.

Connection. Finally, it is not enough to know in what direction to move the organization, followers value leaders who connect with them. Successful leaders create an emotional connection between them and their followers. Successful leaders can communicate the direction in ways that encourage

> followers to get involved, to reframe their thinking, to reorient their energy. They have the capacity to move people to action, to communicate persuasively, and to strengthen the confidence of followers (Gardner, 1989).
>
> Some have termed this quality as the 'inspirational quotient." To frame the quality this way however, is controversial. On the one hand, there are those potential followers who because of experiences do not trust inspirational leaders. On the other hand, many leaders dismiss the quality as unnecessary. They point to examples of successful leaders such as Ghandi who was quiet and unspectacular. Yet, whatever their outward style, leaders must inspire follower confidence in the validity of the goal. The leader's inspirational message is transmitted through three themes: (1) here are the goals which are true and right and which we share, (2) here is how we can reach them, (3) we are strong and capable, and able to accomplish these goals. The connection is solidified through the leader's enthusiasm and excitement which signals a personal commitment and passion to the cause to potential followers.

There are limits to the usefulness of the trait approach, even though the research on leaders suggests they do indeed exhibit attributes of personality, habits, and skills which are important factors when determining success. A social scientist, Edwin Hollander (1967) explained the limitations of the trait approach in the following paragraph:

> The largest deficiency in the trait approach was its insistence upon looking for stable features of "leaders" across many situations. Again this is not the same as studying "leadership" as a process. At any rate, the trait approach failed to recognize that leadership involves a network of relationships with other individuals who are engaged in a situation with a focal activity.

INSTRUMENT ANALYSIS

We reviewed 120 publicly available instruments that are primarily self-rating instruments to determine if they can measure the leader attributes. These instruments also have in common an assessment-for-development focus, a scaling method that permits assessment along a continuum and sound psychometric properties. Several factors were used to evaluate the instruments: (a) cost of use; (b) type of response scale and length of instrument; (c) psychometric properties; (d) ease of scoring; (f) ability to administer on-line; and, (g) fidelity with the leadership areas (attributes, processes, and functions) to be assessed.

Forty of the instruments were identified to measure some of the leader attributes of aspiration, adaptiveness, attraction, assertiveness, character, confidence, connection, competence. These forty instruments are identified in Table 1.Two instruments, Benchmarks and Dimensions of Leadership Profile, were able to measure 6 of the 8 leader attributes. Executive Success Profile was able to measure 4 of the 8 attributes. The remaining 37 instruments were able to measure fewer than 3 attributes.

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Table 1: Leadership Attributes by Assessment Instrument

INSTRUMENT	CHARACTERISTIC				CREDIBILITY			
	Aspiration	Adaptive	Attraction	Assertiveness	Character	Confidence	Connection	Competence
Acumen Leadership Skills								X
Acumen Leadership Workstyles					X			
Administrative Stress Index		X						
Benchmarks		X		X	X	X	X	X
Big Five Locator			X				X	
Campbell Leadership Index	X	X			X			
Compass: Managerial Practices Survey				X				
Critical Thinking Test								X
Denison Leadership Development Survey							X	
Developing the Leader Within	X					X		
Diagnostic Assessment of School and Principal Effectiveness					X			
Dimensions of Leadership Profile			X	X	X	X	X	X
Executive Success Profile	X		X		X		X	
Five Star Supervisor Leadership Skills Inventory					X		X	

INSTRUMENT	CHARACTERISTIC				CREDIBILITY			
	Aspiration	Adaptive	Attraction	Assertiveness	Character	Confidence	Connection	Competence
Fundamental Interpersonal Relations Orientation: Behavior							X	
Leader Adaptability and Style Inventory					X			
The Leadership and Management of Schools	X							
Leadership Assessment Instrument								X
Leadership Behavior Analysis II		X						X
Leadership Behavior D Questionnaire								
Leadership Behavior Questionnaire	X				X			X
Leadership Effectiveness Analysis	X							
Leadership Practices Inventory-2^nd								X
Leadership Skills Assessment				X				X
Leadership Skills Inventory	X							
Leadership Strategies Inventory	X							
Leadership Trait Questionnaire					X	X		
Least Preferred Co-Worker Measure							X	
LMX 7					X			
Management Practices Survey							X	

INSTRUMENT	CHARACTERISTIC				CREDIBILITY			
	Aspiration	Adaptive	Attraction	Assertiveness	Character	Confidence	Connection	Competence
Manager View / 360	X							
Matrix: The Influence Behavior Quest.				X			X	
Management Effectiveness Profile System					X			
NEO – PI - R				X		X		
Path/Goal Leadership Questionnaire					X			
The Profiler	X	X		X	X	X		
Prospector	X			X	X			
Survey of Executive Leadership								
Survey of Leadership Practices	X			X				
Survey of Management Practices	X				X			
System for Multi-Level Observation of Groups		X						
VOICES		X		X	X			

CONCLUSION

Two instruments, Benchmarks and Dimensions of Leadership Profile (DLP), were able to measure 6 of the 8 **leader attributes**. In both cases the attribute of aspiration was left immeasurable by the instruments. Additionally, the DLP was unable to measure adaptiveness and Benchmarks was unable to measure attraction but was able to measure connection which is a closely associated attribute.

The top instruments identified for further analysis were (a) Benchmarks, (b) Dimensions of Leadership Profile, (c) Leadership Skills Test, (d) Omnia Profile, (e) Survey of Leadership Practices, (f) Survey of Management Practices, and (g) NEO – PI-R. Table 2 illustrates information about the cost, length, scoring process, on-line capability, and psychometric properties of these selected instruments

--Table 2 here--

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Table 2: Preliminary Instrument Analysis – Leadership Attributes

ATTRIBUTES							
Instrument	**Cost**	**Length**	**Scoring Process**	**on-line**	**Validity**	**Reliability**	**Comments**
Benchmarks **(Bench)**	$275 includes survey and developmental learning guide	171 items based on 5-point rating scale 30 minutes to complete 22 scales broken into 2 major sections: managerial skills and perspectives (106 items) and Potential Flaws (26 items) 360-degree anaylsis	Vendor and self-scored	√	High predictive validity	Test-retest (.62 - .87) Internal Consistency (section 1: .75. - .97) (section 2: .70 - .92)	Resourcefulness (17) Doing Whatever It Takes (14) Quick Study (4) Decisiveness (4) Leading Employees (13) Setting a Developmental Climate (5) Confronting Problem Employees (4) Work Team Orientation (4) Hiring Talented Staff (3) Building and Mending Relationships (11) Compassion and Sensitivity (4) Straightforwardness and Composure (6) Balance Between Personal Life and Work (4) Self-awareness (4) Putting People at Ease (4) Acting with Flexibility (5)
Dimensions of Leadership Profile **(DLP)**	$15.50	12 items	Self-scored			Internal Consistency (.55 - .98)	Integrity Self-renewal Fortitude Perceiving Judgment Performing Boldness Team building Collaboration Inspiring Serving Enthusiasm

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Instrument	Cost	Length	Scoring Process	on-line	Validity	Reliability	Comments
Leadership Skills Test **(LST)**	$69	40 comparison sets measuring 10 skill dimensions	15-20 minutes to complete Self-administered and self-scored	—	—	—	Coaching Communicating Empowering Facilitating Influencing Managing change Managing projects Servicing customers Solution finding Team building
Omnia Profile **(OP)**	$250	360-degree analysis		√			Good professional practice Decision making Providing individual support Holding high performance expectations Development of vision and goals
Survey of Leadership Practices **(SLP)**	~$105 per survey, including scoring and feedback report	85 items and 3 open-ended questions completed in 25-30 minutes (open architecture) 360-degree analysis	Self-scored, vender, and self-score software		high	Internal Consistency (.67 - .93 Interrater (.78 - .96)	Vision Risk taking Organizational sensitivity Encouraging participation Teaming Persuasiveness Feedback Energy Perseverance Sharing credit Effectiveness Coping with stress Trustworthiness Source of power
Survey of Management Practices **(SMP)**	~$105 per survey, including scoring and feedback report	145 items completed in 25-30 minutes (open architecture) 360-degree analysis	Self-scored, vender, and self-score software			Internal Consistency (.77 - .98) Interrater (90 - .93)	Clarity of goals and objectives Planning Problem solving Facilitating work of others Exercising positive control Approachability Teambuilding Interested in subordinates' growth Work involvement Opportunity for growth

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Instrument	Cost	Length	Scoring Process	on-line	Validity	Reliability	Comments
NEO – PI –R **(NEO)**	$190.00 Kit includes manual, 10 reusable Form S test booklets, 10 Form R test	240-items on 5 point scale	Hand-scored or machine-scored	√	Validated against other personality inventories Construct validity	N .92 E .89 O .87 A .86 C .90	Measures only 2/8 attributes: Assertiveness Confidence

CORE COMPETENCE: PROCESSES AND FUNCTIONS

In addition to the conceptualization of these leader attributes, several organizations charged with training school leaders, such as the National Association of Secondary School Principals (NASSP) also described the traits of successful leaders from a skill framework. They initially used the framework to identify individuals with skills to succeed as a school principal. Currently, this framework is also being used to assess potential school principals, identify strengths and weaknesses, and prescribe developmental opportunities for principal candidates.

The notion of assessment began in the early 1900s by German psychologists trying to identify potential military officers. The practice was discarded after World War II. However, in 1956 the American Telephone and Telegraph (AT&T) company reintroduced the notion of skill assessment with studies of their executives. The AT&T study formed the foundation for other efforts to study executive traits including those initiated by NASSP in the educational field and the Center for Creative Leadership's "Looking Glass" in the business field. The instruments used by each of the three efforts were validated in a similar manner. In the NASSP model a review of the trait literature was conducted followed by tasks analyses of school principals. The measures the scale incorporated and the process used was validated by researchers from Michigan State University in 1983. It has been successfully use to identify principals since then.

Competent leaders exhibit several important skills which provide the confidence and competence which are an important source of their credibility. Followers want leaders who not only know what to do but how to do it. The core processes of decision making, problem solving, communication, conflict management, and motivating underly managerial and transformational leadership skills. The core functions and processes identified in Figure 1 captures the types of skills which lead to competence and support the leadership framework through its delineation of (1) the core functions of planning, organizing, allocating, and monitoring, (2) the continuous process skills of problem solving, decision making, and communications, and (3) the mediating process skills of motivating and conflict management. These core competence skills (identified in Figure 3) are used to support both the management functions and the transformational change functions of leaders.

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CONTINUOUS PROCESS SKILLS
Able to get others involved in solving problems (NASSP, 1990).

Able to seek out relevant data and analyze complex information to decide the important elements of a problem situation; searching for information with a purpose (NASSP, 1990).

Able to reach logical conclusions and make high quality decisions based on available information; skill in identifying educational needs and setting priorities; ability to evaluate critically written communications (NASSP, 1990).

Able to combine hard data, questionable data, and intuitive guesses to arrive at a conclusion that events prove to be correct (Gardner, 1989).

Able to recognize when a decision is required (disregarding the quality of the decision) and to act quickly (NASSP, 1990).

Know what information to communicate and to whom (NASSP, 1990). Able to make clear oral presentation of facts or ideas (NASSP, 1990). Communicates easily at all levels. Spokesperson and diplomat. Able to express ideas clearly in writing; to write appropriately for different audiences - students, teachers, parents, etc. (NASSP, 1990).

MEDIATING PROCESS SKILLS
Able to motivate - Leaders provide visionary inspiration, motivation and direction setting. Understanding attitudes and needs of followers. Skill in dealing with people (Gardner, 1989; NASSP, 1990).

Able to resolve conflicts; tact in dealing with persons from different backgrounds; ability to deal effectively with people concerning emotional issues NASSP, 1990).

CORE FUNCTION SKILLS
Able to establish a course of action for self or others to accomplish a specific goal; to plan, schedule, and control the work of others (NASSP, 1990; AT&T).

Capacity to manage, decide and set priorities. Able to allocate responsibilities, and resources (Gardner, 1989) Skill in using resources in an optimal fashion (NASSP, 1990; AT&T).

Able to establish procedures to monitor and regulate processes, tasks, job activities and responsibilities (NASSP, 1990).

Figure 3. Leadership Core Competence Requirements

INSTRUMENT ANALYSIS

The skills identified on these three scales are found in Tables 3 and 5 which identify the core functions and core processes and the instruments which are able to provide reflective information to the leaders. Table 3 describes the ability of 37 of 120 instruments to measure the core processes.

Twenty-six instruments were identified to measure some the core functions of planning, organizing, allocating and monitoring. One instrument - the Management Practice Inventory - was capable of measuring all 4 functions. Four instruments were capable of measuring 3 functions – Leatherman Leadership Questionnaire, Management Behavior Assessment Test, Management Practices Survey, and the Profiler. The remaining 21 instruments were able to measure fewer than 2 functions.

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Table 3. Core Process Skills by Assessment Instrument

INSTRUMENT	CORE PROCESS SKILLS				
	Problem Solving	Decision Making	Communicating	Motivating	Conflict Management
Administrative Stress Index					X
Benchmarks		X			X
Compass: Managerial Practices Survey	X			X	X
Critical Thinking Test	X				
Decision-Making Inventory		X			
Dimensions of Leadership Profile					X
Fundamental Interpersonal Relations Orientation: Behavior			X		
The Leadership and Management of Schools		X			
Leadership Behavior Questionnaire			X		
Leadership Practices Inventory-2nd				X	
Leadership Skills Assessment		X	X		X
Leadership Skills Inventory	X	X	X		
Leatherman Leadership Questionnaire	X	X	X	X	X
Management Behavior Assessment Test			X		X
Management Practices Inventory		X	X	X	
Management Practices Questionnaire		X	X		X
Management Practices Survey	X		X	X	X
Management Roles Inventory		X	X	X	
Manager View / 360	X		X		
Matrix: The Influence Behavior Quest.				X	X
Management Effectiveness Profile System	X				
Personality Advantage Questionnaire			X	X	
Problem-Solving Skills Questionnaire			X		
The Profiler			X		X

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INSTRUMENT	CORE PROCESS SKILLS				
	Problem Solving	Decision Making	Communicating	Motivating	Conflict Management
Prospector					X
SMT Leader Survey			X		X
School Administrator Skills			X		
Superior Management Practices Questionnaire			X	X	
Supervisory Practices Survey			X	X	
Supervisory Skills Aptitude Test			X	X	
Supervisory Skills Test	X		X	X	X
Supervisory Styles Inventory	X		X	X	
Survey of Leadership Practices					X
Survey of Management Practices	X				
Teamwork			X	X	
Time Management	X	X			
VOICES	X	X			X

CONCLUSION
One instrument, Leatherman Leadership Questionnaire was capable of measuring all 5 **core processes**. One instrument, Supervisory Skills Inventory, was capable of measuring 4 of the 5 core processes.

The top instruments identified for further analysis were (a) COMPASS: Managerial Practices Survey, (b) Leadership Skills Assessment, (c) Leatherman Leadership Questionnaire, (d) Survey of Management Practices, and (e) Supervisory Skills Test. Table 4 illustrates information about the cost, length, scoring process, on-line capability, and psychometric properties of these selected instruments.

--Table 4 here—

Table 4: Preliminary Instrument Analysis-Leadership Processes

Processes

Instrument	Cost	Length	Scoring Process	on-line	Validity	Reliability	Comments
COMPASS: Managerial Practices Survey **(CMPS)**	$295	84 items	Self-scored, vendor scored				
Leadership Skills Assessment **(LSA)**	None	78 items	On-line				
Survey of Management Practices **(SMP)**							

CORE FUNCTIONS

Thirty-seven instruments were identified to measure some of the core processes of problem solving, decision making, communicating, motivating and conflict management (Table 5). One instrument, Leatherman Leadership Questionnaire was capable of measuring all 5 core processes. One instrument, Supervisory Skills Inventory, was capable of measuring 4 of the 5 core processes. The remaining 35 instruments were able to measure fewer than 3 core processes.

Table 5. Leadership Functions by Assessment Instrument

INSTRUMENT	FUNCTION			
	Planning	Organizing	Allocating	Monitoring
Benchmarks				X
Compass: Managerial Practices Survey	X			X
Dimensions of Leadership Profile				X
Leadership Practices Inventory-2nd	X			
Leadership Skills Assessment	X	X		X
Leadership Skills Inventory	X			
Leatherman Leadership Questionnaire	X	X		X
Management Behavior Assessment Test	X	X		X
Management Practices Inventory	X	X	X	X
Management Practices Survey	X	X		X
Matrix: The Influence Behavior Quest.				X
Management Effectiveness Profile System	X	X	X	
The Profiler	X	X		X
Prospector				X
School Administrator Skills		X		
Skills and Attributes Inventory		X		
Styles of Leadership Survey	X			X
Supervisory Skills Aptitude Test	X	X		
Supervisory Skills Test	X			
Supervisory Styles Inventory		X		
Survey of Leadership Practices				X
Survey of Management Practices	X	X		
Taking Your Leadership Temperature	X			
Time Management Inventory	X	X		
Types of Work Index	X			X
The Visionary Leader: Leader Behavior Questionnaire	X	X		

CONCLUSION

One instrument - the Management Practice Inventory - was capable of measuring all 4 **core functions**. Four instruments were capable of measuring 3 of the 4 core functions – Leatherman Leadership Questionnaire (LLQ), Management Behavior Assessment Test (MBAT), Management Practices Survey, and the Profiler. LLQ was unable to measure the allocating function.

The top instruments identified for further analysis were (a), COMPASS, (b) The Leatherman Leadership Questionnaire, (c) Management Behavior Assessment, (d) Management Practices Survey, and (e) Management Effectiveness Profile System. Table 6 illustrates information about the cost, length, scoring process, on-line capability, and psychometric properties of these selected instruments

--Table 6 here--

Table 6: Preliminary Instrument Analysis- Leadership Functions

Functions

Instrument	Cost	Length	Scoring Process	on-line	Validity	Reliability	Comments
COMPASS **(CMPS)**	$295	84 items	Self-scored, vendor scored				
Leatherman Leadership Questionnaire **(LLQ)**				√			Assigning work Conducting meetings Career counseling Giving positive feedback Coaching Negotiating Oral communication Performance appraisal Managing change Performance standards Employee complaints Persuasion Employee conflicts Making presentations Performance counseling Problem solving Making decisions Selection interviews Delegating Team building Discipline Termination interviews Handling emotional situations Goal setting Time Management Handling grievances One-on-one Training

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Instrument	Cost	Length	Scoring Process	on-line	Validity	Reliability	Comments
Leatherman Leadership Questionnaire **(LLQ)**	$95/person initial $1000 set-up cost	339 items (2 parts) · Total: 3 - 5 hours to complete	On-line Hard-copy report sent	√	Will be needed to be validated…	Internal Consistency: (.90 - .99)	Assigning work Conducting meetings Career counseling Giving positive feedback Coaching Negotiating Oral communication Performance appraisal Managing change Performance standards Employee complaints Persuasion Employee conflicts Making presentations Performance counseling Problem solving Making decisions Selection interviews Delegating Team building Discipline Termination interviews Handling emotional situations Goal setting Time Management Handling grievances One-on-one Training

CORE STRATEGIES

Forty eight instruments were identified to measure some of the core strategies of determining direction, creating coherent instructional programs, building organizational capacity, and establishing continuous improvement and accountability (Table 7). Three instruments, Leadership Report, Leadership Strategies Inventory, Multi-Factor Leadership Questionnaire, were capable of measuring all 4 core strategies. Four instruments - Instructional Leadership Inventory, Management Behavior Assessment Test, Survey of Executive Leadership, and the Survey of Leadership Practices - were capable of measuring 3 of the four core strategies. The remaining 41 instruments were able to measure fewer than 3 core strategies.

Table 7: Core Strategies by Assessment Instrument

INSTRUMENT	STRATEGIES			
	Developing a strategic mindset and organizational direction	Creating a coherent instructional system	Building organizational capacity and culture	Establishing a continuous improvement and accountability system
Acumen Leadership Skills	X		X	
Benchmarks			X	
Compass: Managerial Practices Survey			X	
Developing the Leader Within			X	X
Dimensions of Leadership Profile	X		X	X
Executive Success Profile	X		X	
Five Star Supervisor Leadership Skills Inventory			X	
Instructional Leadership Inventory	X	X	X	
Leader Adaptability and Style Inventory	X		X	
The Leadership and Management of Schools	X			
Leadership Behavior D Questionnaire	X		X	
Leadership Behavior Questionnaire			X	
Leadership Dimensions Survey	X			
Leadership Effectiveness Analysis	X		X	
Leadership Practices Inventory-2nd				X
Leadership Qualities Scale			X	
Leadership Report	X	X	X	X
Leadership Skills Assessment	X			
Leadership Sphere Inventory				X
Leadership Strategies Inventory	X	X	X	X
Leadership Skills Inventory: Self-Assessment Version			X	
Leatherman Leadership Questionnaire	X		X	
Management Behavior Assessment Test	X		X	X

INSTRUMENT	STRATEGIES			
	Developing a strategic mindset and organizational direction	Creating a coherent instructional system	Building organizational capacity and culture	Establishing a continuous improvement and accountability system
Matrix: The Influence Behavior Quest.				X
Meyer Kendall Assessment Survey (MKAS)			X	X
Multi-Factor Leadership Questionnaire	X	X	X	X
Organizational Commitment Questionnaire	X		X	
The Profiler	X		X	
Prospector				X
School Administrator Skills			X	
Styles of Leadership Survey	X			
Styles of Management Inventory				
Superior Management Practices Questionnaire	X			X
Supervisory Practices Survey				X
Supervisory Skills Aptitude Test			X	X
Supervisory Skills Test	X		X	
Survey of Executive Leadership	X		X	X
Survey of Leadership Practices	X		X	X
Survey of Management Practices			X	
Team Performance Questionnaire	X			
Teamwork			X	
Time Management Personality Profile				X
Types of Work Index				X
The Visionary Leader: Leader Behavior Questionnaire	X		X	
VOICES	X		X	
Work Commitment Index				X

CONCLUSION

Three instruments, Leadership Report, Leadership Strategies Inventory, Multi-Factor Leadership Questionnaire, were capable of measuring all 4 **core strategies**. Four instruments - Instructional Leadership Inventory, Management Behavior Assessment Test, Survey of Executive Leadership, and the Survey of Leadership Practices - were capable of measuring 3 of the four core strategies.

The top instruments identified for further analysis were (a), Dimensions of Leadership Profile (b), Leadership Report, (c) Leadership Strategies Inventory, (d) Management Behavior Assessment Test, and (e) The Leadership and Management of Schools. Table 8 illustrates information about the cost, length, scoring process, on-line capability, and psychometric properties of these selected instruments.

--Table 8 here--

Table 8: Preliminary Instrument Analysis – Transformational Skills

Transformational Skills							
Instrument	**Cost**	**Length**	**Scoring Process**	**On-line**	**Validity**	**Reliability**	**Comments**
Dimensions of Leadership Profile **(DLP)**	$15.50	12 items	Self-scored				
Leadership Report **(LR)**							
Leadership Strategies Test **(LST)**		48 items	Self-scored				
Management Behavior Assessment Test **(MBAT)**							
The Leadership and Management of Schools **(LMS)**	none	50 items	Hand-scored				

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Instrument	**Cost**	**Length**	**Scoring Process**	**on-line**	**Validity**	**Reliability**	**Comments**
Management Behavior Assessment Test **(MBAT)**							
Management Practices Survey **(MSP)**							
Management Effectiveness Profile System **(MEPS)**	$125	98 items					

RECOMMENDATIONS

The research team recommends that we present the findings of this first review to the projects technical panel to confirm our analyses and to identify more instruments which are available commercially such as the NASSP Assessment, the ISLLC standards instruments as well as Personnel Decisions International and Motorola University to assess their ability to assess the attributes and core functions, processes and strategies. Upon review of the technical panel, prices will be established and a recommendation will be made to adopt, adapt and/or develop the assessments needed to meet the charge of the South Florida Annenberg Challenge.

Executive Summary

Florida Atlantic University College of Education was commissioned by The South Florida Annenberg Challenge to develop and create 5 diagnostic and assessment instruments for leaders that will provide candidates information about (a) personality traits related to leadership, (b) transformational leadership potential, (c) leadership skills, (d) written and oral communication skills, and (e) decision-making and task prioritization abilities. The instruments will be used to screen potential administrators and determine their leadership development needs. The final product will be battery of on-line, self-administered assessment instruments that may be quickly and cost effectively used. The proposed project commenced in February - 2002 and will be completed by February 2003.

The project is scheduled to be completed in three phases. In the first phase, an evaluation of existing leadership assessment instruments was made to determine their applicability, relevance, appropriateness, and psychometric strengths given the aim of the project. The assessment instruments identified in this report address the leadership domains identified by the Annenberg Challenge in their RFP and listed above. In the second phase, new items will be created based on leadership constructs not assessed by packaged products. The validity and reliability of the items will be established. These constructs and items will enhance the scope of the assessment scheme. In the final phase, all assessments will be placed in electronic form and pilot-tested prior to delivery to the South Florida Annenberg Challenge.

This report completes the first phase of the project by providing the conclusions and recommendations of the Technical Panel's analyses. A conceptual framework of underlying constructs of leadership was extracted from the leadership literature inn business, education and psychology. The framework was used to guide the classification and evaluation for the available assessment instruments on the market that was presented at the first Steering Committee meeting. Based on comments received and discussions by the Technical Panel, the core skills were given a more visible place in the framework. Therefore, the first recommendation of the Technical Panel is use (a) attributes, (b) core processes, (c) core functions, (d) core skills, and (e) core strategies illustrated in Figure 1, to guide the analysis and selection of tests.

The tests were categorized using the constructs underlying leadership to first show their fidelity with the constructs. Initial results identified 120 publicly available assessment instruments. These results were presented to the first meeting of the Steering Committee. Comments received suggested that the Technical Panel pay close attention to issues of reliability and validity as well as number of constructs assessed when selecting potential assessment instruments for the second round of the analysis.

In addition to these criteria, the Technical Panel also used several other factors to evaluate the instruments such as: (a) cost of use; (b) type of response scale and length of instrument; (c) psychometric properties; (d) ease of scoring; (f) ability to administer on-line; and, (g) fidelity with the leadership areas to be assessed.

Based on these reviews three recommendations are made. First, the **Benchmark** instrument available from the Center of Creative Leadership be used to assess the attributes of leadership. Second, the **Leatherman Leadership Questionnaire** be used to assess the core processes and functions. Third, **new instruments be developed to assess the core skills and strategies** unless more robust instruments are found within the next month.

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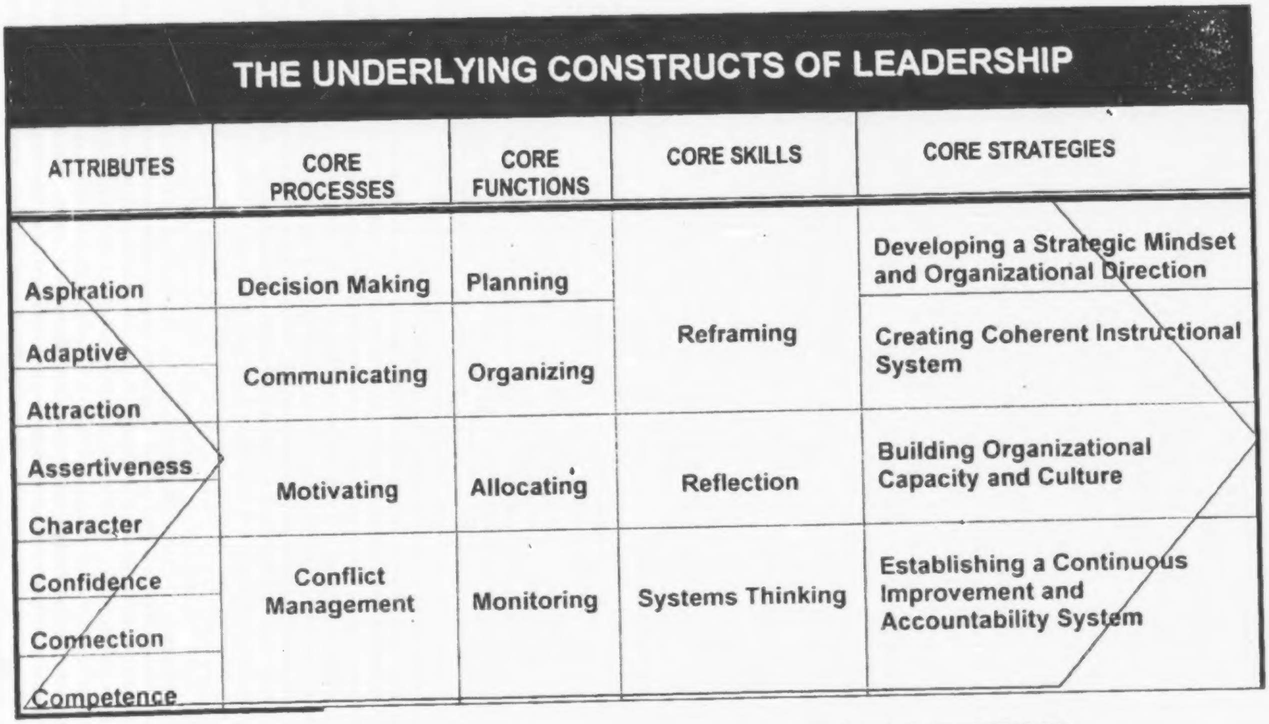
CONCLUSIONS AND RECOMMENDATIONS

1. CONSTRUCTS

Analysis. A conceptual framework of underlying constructs of leadership was extracted from the leadership literature in business, education, and psychology. The framework was used to guide the classification and evaluation for the available assessment instruments on the market that were presented at the first Steering Committee meeting. Based on comments received and discussions by the Technical Panel, the core skills were given a more visible place in the framework.

Recommendation: The Technical Panel recommends that the constructs: (a) attributes, (b) core processes, (c) core functions, (d) core skills, and (e) core strategies illustrated in Figure 1, be used to guide the analysis and selection of tests.



THE UNDERLYING CONSTRUCTS OF LEADERSHIP

ATTRIBUTES	CORE PROCESSES	CORE FUNCTIONS	CORE SKILLS	CORE STRATEGIES
Aspiration	Decision Making	Planning	Reframing	Developing a Strategic Mindset and Organizational Direction
Adaptive	Communicating	Organizing		Creating Coherent Instructional System
Attraction				
Assertiveness	Motivating	Allocating	Reflection	Building Organizational Capacity and Culture
Character				
Confidence	Conflict Management	Monitoring	Systems Thinking	Establishing a Continuous Improvement and Accountability System
Connection				
Competence				

MANAGEMENT → STRATEGIC LEADERSHIP

Source: Pisapia, J. (in process). Strategic Leadership: Constructs, Dimensions and Principles

Figure 1. The Underlying Constructs of Leadership

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1. LEADER ATTRIBUTES

Analysis. In the first report to the Steering Committee, forty instruments that measured some leader attributes were identified. From this list, the Technical Panel selected seven instruments most capable of measuring the attributes of *aspiration, adaptiveness, attraction, assertiveness, character, confidence, connection,* and *competence*. These instruments were identified as: (a) Benchmarks, (b) Dimensions of Leadership Profile (DLP), (c) Survey of Leadership Practices (SLP), (d) Omnia Profile (OP), (e) Survey of Management Practices (SMP), (f) Omnia ProManager (OPM), and (g) NEO – PI-R.

The actual survey or test, accompanying administrator's manual, the development research report, and various supplemental materials were ordered and analyzed for each instrument in accordance with the criteria established.

The Technical Panel examined and evaluated each instrument against the predetermined set of criteria, and in several cases participated in conference calls with vendor representatives. These analyses are found in Table 1. Of the instruments evaluated against our criteria for leadership attributes, Benchmarks, Dimensions of Leadership Profile, and Survey of Leadership Practices, more fully met the needs of the project.

Recommendations

Recommendation 1: The Technical Panel recommends using Benchmarks for the assessment of leadership attributes. Created by the Center for Creative Leadership, Benchmarks measures 6 of the 8 leader attributes. The focus of the 164-item questionnaire and process is to capture what managers have learned from experiences and the skills they developed; what values and perspectives are learned; and what the blocks are to further development. Its validity and reliability are among the highest of the instruments in this category. There is a web-based version. The instrument is scored by the Center for Creative Leadership, and a leadership development guide is provided to test-takers to initiate their professional development plan. Costs are $245 per person and quantity breaks can be negotiated.

Recommendation 2: In order to develop a comfort level with the instrument, the Technical Panel recommends that the instrument be pilot tested with 30 members of the Annenberg Principal cohort. Based on this pilot test, negotiations can begin for a contract to include Benchmarks as an assessment of the Center. If negotiations are successful, a portal will be created on the Annenberg web site.

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Table 1: Evaluation of Assessment Instruments Related to Leadership Attributes

ATTRIBUTES							
Instrument	**Cost**	**Length**	**Scoring Process**	**Scale Descriptors**	**Validity**	**Reliability**	**Comments**
Benchmarks **(Bench)**	$275 includes survey and developmental learning guide	171 items based on 5-point Likert-type rating scale 30 minutes to complete 22 scales broken into 2 major sections: managerial skills and perspectives (106 items) and Potential Flaws (26 items) 360-degree	Self and vendor scored. Available on-line.	Resourcefulness Doing Whatever It Takes Quick Study Decisiveness Leading Employees Setting a Developmental Climate Confronting Problem Employees Work Team Orientation Hiring Talented Staff Building and Mending Relationships Compassion and Sensitivity Straightforwardness and Composure Balance Between Personal Life and Work Self-awareness Putting People at Ease Acting with Flexibility	High construct validity	Test-retest (.62 - .87) Internal Consistency *Cronbach's alpha* (part 1: .75. -.97) (part 2: .70 -.92)	Well-developed, conceptualized, and studied. Captures what a manager has learned from experiences and skills developed; values and perspectives learned; and obstacles to further development. Includes developmental guide for professional development.
Dimensions of Leadership Profile **(DLP)**	$15.50	12 items on Likert-type scale (5-most important statement, 1-least important statement).	Self-scored on test booklet. Not available on-line.	Integrity Self-renewal Fortitude Perceiving Judgment Performing Boldness Team building Collaboration Inspiring Serving Enthusiasm	No data available. Good face validity. Scales arrived at by factor analysis.	Test-retest (.55 - .98) Cronbach's alpha (.61 - .80)	Some presence of supporting research in the professional literature. For a team—Identifies respondent's preferences for one of four roles: analysis, accomplishment, interaction, or character

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Instrument	Cost	Length	Scoring Process	Scale Descriptors	Validity	Reliability	Comments
Survey of Leadership Practices **(SLP)**	~$105 per survey, including scoring and feedback report	85 items on 7-point Likert-type scale and 3 open-ended questions completed in 25-30 minutes (open architecture) 360-degree analysis	Self-scored, vender, and self-score software. Narrative and line-graph (centile rank comparison)	Vision Risk taking Organizational sensitivity Encouraging participation Teaming Persuasiveness Feedback Energy Perseverance Sharing credit Effectiveness Coping with stress Trustworthiness Source of power	Effectiveness scale serves as validity measure (see p. 275 of instrument description)	Internal Consistency – *Cronbach's alpha* (.67 - .93) Interrater (.78 - .96)	Well-constructed instrument with good representation in the literature.
The Omnia Profile— **(OP)**	$250	Selection of adjectives/traits	Scoring on-line. Report available from publisher as part of administration and scoring procedures.	Good professional practice Decision making Providing individual support Holding high performance expectations Development of vision and goals	No data available—Good face validity.	No data available.	Minimal presence in the professional literature as not intended for research.
Survey of Management Practices **(SMP)**	~$105 per survey, including scoring and feedback report	145 items completed in 25-30 minutes (open architecture) 360-degree analysis	Self-scored, vender, and self-score software	Clarity of goals and objectives Planning Problem solving Facilitating work of others Exercising positive control Approachability Teambuilding Interested in subordinates' growth Work involvement Opportunity for growth	High degree of construct validity (.91)	Internal Consistency *Cronbach's alpha* (.77 - .98) Interrater (90 - .93)	Clarity of goals and objectives Planning Problem solving Facilitating work of others Exercising positive control Approachability Teambuilding Interested in subordinates' growth Work involvement Opportunity for growth

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Instrument	Cost	Length	Scoring Process	Scale Descriptors	Validity	Reliability	Comments
NEO – PI –R **(NEO)**	$190.00 Kit includes manual, 10 reusable Form S test booklets, 10 Form R test	240-items on 5 point scale	Hand-scored or machine-scored	Neuroticism Extraversion Openness Agreeableness Conscientiousness	Validated against other personality inventories. High construct validity	Internal Consistency *Cronbach's alpha* (.86 - .92)	Measures only 2/8 attributes: Assertiveness Confidence
The Omnia ProManager **(OPM)**	$250/person						ORDERED 05/22/02 An in-depth, 360-degree analysis of a division or department, based on the manager's self-assessment and associates' anonymous assessment of him or her. Teambuilding tool.

2. CORE PROCESSES

Analysis. In the first report to the Steering Committee, thirty-seven instruments were initially identified to measure some of the core processes of *problem solving, decision-making, communicating, motivating*, and *conflict management*. The Technical Panel selected the following four instruments for a more in depth evaluation: (a) Leatherman Leadership Questionnaire (LLQ), (b) Assessment Inventory for Management (AIM), (c) Compass: Managerial Practices Survey (CMPS), and (d) Leadership Skills Test (LST).

The actual survey or test, accompanying administrator's manual, the development research report, and various supplemental materials were ordered and analyzed for each instrument in accordance with the criteria established.

The Technical Panel examined each instrument against the evaluation criteria (Table 2), as well as participated in conference calls with vendor representatives. Of the four instruments evaluated against our criteria for processes and functions, Leatherman Leadership Questionnaire, Assessment Inventory for Management, and Compass: The Managerial Practices Survey, more fully met the needs of the project.

Recommendations

Recommendation 1: The Technical Panel recommends the use of the Leatherman Leadership Questionnaire. Created by the International Training Consultants, Inc., this instrument measures 7 of the 8 leader attributes. The instrument measures knowledge of the leadership constructs, and the results are readily usable for professional development activities. Its validity and reliability was the highest of the instruments in this category. The Vendor scores the instrument, and a leadership development manual is provided to the individual to initiate their professional development plan. There is a web-based version. The instrument can be customized to reduce costs and still measure the constructs guiding the project. Center administrator costs are $95 per person and an initial $1000 set-up cost; quantity breaks can be negotiated.

Recommendation 2: In order to develop a comfort level with the instrument, the Technical Panel recommends that the instrument be pilot tested with 30 members of the Annenberg Principal cohort. Based on this pilot test, negotiations can begin for a contract to include the LLQ as an assessment of the Center. If negotiations are successful, a portal will be created on the Annenberg web site.

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Table 2: Evaluation of Assessment Instruments Related to Leadership Core Processes

Processes							
Instrument	**Cost**	**Length**	**Scoring Process**	**Scale Descriptors**	**Validity**	**Reliability**	**Comments**
Leatherman Leadership Questionnaire **(LLQ)**	$95/$75 person initial $1000 set-up cost Includes a post-test development guide for professional growth activities. Cost breaks for quantity.	339 items (2 parts) Total: 3 - 5 hours to complete	On-line Hard-copy report sent Paper/pencil vendor scored.	Assigning work Conducting meetings Career counseling Giving positive feedback Coaching Negotiating Oral communication Performance appraisal Managing change Performance standards Employee complaints Persuasion Employee conflicts Making presentations Performance counseling Problem solving Making decisions Selection interviews Delegating Team building Discipline Termination interviews Handling emotional situations Goal setting Time Management Handling grievances One-on-one Training	.89 – small sample studies (n=21). Has content not construct validity.	Internal Consistency *Cronbach's alpha* (.90 - .99)	27 tasks by management and supervision Can be customized.

Instrument	Cost	Length	Scoring Process	Scale Descriptors	Validity	Reliability	Comments
Assessment Inventory for Management **(AIM)**	$35 complete kit—22 page booklet $150 per scored answer booklet	300+ multiple choice items: -biographical (105 items) -cognitive ability (52 items) -personal characteristics (146 items) -situational judgment (40 items) 120-180 minutes	Mail-in scoring	Staffing Recruiting Counseling Delegating Rewarding Selection Training Supporting Motivating Networking Supervision Business management Field office development Communicating Teambuilding Coordinating Monitoring Planning Problem-solving Decision-making Performance mgt	Limited Self-reports (.10-.37) Face validity (n=2600)	Internal Consistency *Cronbach's alpha* (.60 - .86) Low return rates (20-22%)	Industry specific-Primary purpose is for screening candidates for insurance field sales management positions. Not recommended for high stakes.
COMPASS: Managerial Practices Survey **(CMPS)**	$295	84 items	Self-scored, vendor scored	Involving others Building relationships Coaching Recognizing Managing conflict Influencing Clarifying Planning	High face vali (n=24 HS dept heads)	Test-retest (.48 - .94)	360 degree tool
Leadership Skills Test **(LST)**	$69	40 comparison sets measuring 10 skill dimensions 78 items	15-20 minutes to complete Self-administered and self-scored On-line	Coaching Communicating Empowering Facilitating Influencing Managing change Managing projects Servicing customers Solution finding Team building	No data available.	No data available.	Poor literature/research base.

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3. CORE FUNCTIONS

Analysis. In the first report to the Steering Committee, twenty-six instruments were identified which measure some the core functions of *planning, organizing, allocating and monitoring*. The Technical Panel selected the following four instruments for a more in depth evaluation: (a) Leatherman Leadership Questionnaire (LLQ), (b) Compass: Managerial Practices Survey (CMPS), (c) Survey of Management Practices (SMP), and (d) Management Effectiveness Profile System (MEPS).

The actual survey or test, accompanying administrator's manual, the development research report, and various supplemental materials were ordered and analyzed for each instrument in accordance with the criteria established.

The Technical Panel examined each instrument against the evaluation criteria as well as participated in conference calls with vendor representatives. These results are found in (Table 3).

Of the four instruments evaluated against our criteria for processes and functions, Leatherman Leadership Questionnaire, Assessment Inventory for Management, and Compass: The Managerial Practices Survey, more fully met the needs of the project.

Recommendations

Recommendation 1: The Technical Panel recommends the use of the Leatherman Leadership Questionnaire (LLQ) to measure the core functions. This instrument created by International Training Consultants, Inc. measures all four of the core functions. The instrument measures knowledge of the leadership constructs, and the results are readily usable for professional development activities. Its validity and reliability were the highest of the instruments in this category. The Vendor scores the instrument and a leadership development manual is provided to the individual to initiate his/her professional development plan. There is a web-based version. The instrument can be customized to reduce costs and still measure the constructs guiding the project. Center administrator costs are $1000 first-time set-up cost and $95 per person; quantity breaks can be negotiated.

Recommendation 2: In order to develop a comfort level with the instrument, the Technical Panel recommends that the instrument be pilot tested with 30 members of the Annenberg Principal cohort. Based on this pilot test, negotiations can begin for a contract to include the LLQ as an assessment of the Center. If negotiations are successful, a portal will be created on the Annenberg web site.

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Table 3: Evaluation of Assessment Instruments Related to Leadership Core Functions

Functions							
Instrument	**Cost**	**Length**	**Scoring Process**	**Scale Descriptors**	**Validity**	**Reliability**	**Comments**
COMPASS **(CMPS)**	$295	84 items	Self-scored, vendor scored	Involving others Building relationships Coaching Recognizing Managing conflict Influencing Clarifying Planning	High face validity HS dept heads)	Test-retest (.48 - .94)	360 degree tool
Leatherman Leadership Questionnaire **(LLQ)**	$95/$75 person initial $1000 set-up cost Cost breaks for quantity	339 items (2 parts) Total: 3 - 5 hours to complete	On-line Hard-copy report sent Paper/pencil vendor scored.	Assigning work Conducting meetings Career counseling Giving positive feedback Coaching Negotiating Persuasion Delegating Discipline Goal setting Oral communication Performance appraisal Managing change Performance standards Employee complaints Employee conflicts Making presentations Performance counseling Problem solving Making decisions Selection interviews Team building Termination interviews Handling emotional situations Time Management Handling grievances One-on-one Training	.89 – small sample studies (n=21). Has content not construct validity.	Internal Consistency *Cronbach's alpha* (.90 - .99)	27 tasks by management and supervision Can be customized.

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Instrument	Cost	Length	Scoring Process	Scale Descriptors	Validity	Reliability	Comments
Survey of Management Practices **(SMP)**	~$105 per survey, including scoring and feedback report	145 items completed in 25-30 minutes (open architecture) 360-degree analysis	Self-scored, vender, and self-score software	Clarity of goals and objectives Planning Problem solving Facilitating work of others Exercising positive control Approachability Teambuilding Interested in subordinates' growth Work involvement Opportunity for growth	High degree of construct validity (.91)	Internal Consistency *Cronbach's alpha* (.77 - .98) Interrater (90 - .93)	360 degree tool
Management Effectiveness Profile System **(MEPS)**	$125	98 items anchored rating scale with each item presenting 2 opposite ways of behaving-on 7 point scale		Problem solving Time management Planning Goal setting Performance Organizing Team development Delegating Participating Integrating differences Provide feedback Stress management	Low construct validity (.05)	Internal Consistency *Cronbach's alpha* (.91 - .85)	360-degree tool not validated "snap shot" of manager's behavior patterns

4. CORE SKILLS and STRATEGIES

Analysis. In the first report to the Steering Committee, forty-eight instruments were identified which measured some of the core skills of reframing, reflecting and systems thinking and the core strategies of *determining direction, creating coherent instructional programs, building organizational capacity*, and *establishing accountability*. The Technical Panel selected the following six instruments for a more in-depth evaluation: (a) Dimensions of Leadership Profile (DLP); (b) Leadership Report (LR), (c) Leadership Strategies Test (LST), (d) Management Behavior Assessment Test (MBAT), (e) The Leadership and Management of Schools (LMS), and (f) Multi-Factor Leadership Questionnaire (MLQ).

The actual survey or test, accompanying administrator's manual, the development research report, and various supplemental materials were ordered and analyzed for each instrument in accordance with the criteria established.

The Technical Panel examined each instrument against the evaluation criteria as well as participated in conference calls with vendor representatives. These results are found in (Table 4). Of the instruments evaluated against our criteria for core skills and strategies, it was determined of the tools available on the market there was no instrument which met the guidelines for validity. In fact, these instruments as a whole did not produce validity measures that indicated that they measured what they purported to measure, even though several are used extensively.

Recommendations.

Recommendation 1: The Technical Panel cannot recommend an instrument to measure the core skills and strategies. Therefore, it is recommended that the search for more robust instruments be continued for a period of one month.

Recommendation 2: If more robust instruments cannot be found, then the Technical Panel recommends construction of an instrument for the assessment of the core skills and strategies. This instrument must pass strict validation and reliability studies that indicate it is more robust than those on the market at this time before it is used by the Center.

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Table 4: Evaluation of Assessment Instruments Related to Core Skills and Strategies

Core Skills and Strategies							
Instrument	**Cost**	**Length**	**Scoring Process**	**Scale Descriptors**	**Validity**	**Reliability**	**Comments**
Dimensions of Leadership Profile **(DLP)**	$15.50	12 items	Self-scored	Integrity Self-renewal Fortitude Perceiving Judgment Performing Boldness Team building Collaboration Inspiring Serving Enthusiasm	No data available.	Test-retest (.55 - .98) *Cronbach's alpha* (.61 - .80)	Some presence of supporting research in the professional literature. For a team—Identifies respondent's preferences for one of four roles: analysis, accomplishment, interaction, or character
Leadership Report **(LR)**							
Leadership Strategies Test **(LST)**		48 items	Self-scored		–		
Management Behavior Assessment Test **(MBAT)**					–		
The Leadership and Management of Schools **(LMS)**	none	50 items	Hand-scored		–		
The Multi-Factor Leadership Questionnaire **(MLQ)**					–		

THIRD REPORT TO THE STEERING COMMITTEE

Executive Summary

Florida Atlantic University College of Education was commissioned by The South Florida Annenberg Challenge to develop and create 5 diagnostic and assessment instruments for leaders that will provide candidates information about (a) personality traits related to leadership, (b) transformational leadership potential, (c) leadership skills, (d) written and oral communication skills, and (e) decision-making and task prioritization abilities. The instruments will be used to screen potential administrators and determine their leadership development needs. The final product will be on-line, self-administered assessment instruments that may be quickly and cost effectively used. The proposed project commenced in February - 2002 and will be completed by February, 2003.

Progress to this Point. An evaluation of existing leadership assessment instruments was conducted to determine their applicability, relevance, appropriateness, and psychometric strengths given the aim of the project. Brief summaries of these instruments and development aspects appear in Appendix A. This review resulted in the recommendation of two assessment instruments by the technical committee—**Benchmarks** and the **Leatherman Leadership Questionnaire** (LLQ).

The Annenberg Governing Board reacted to our recommendations by asking that the Center (a) adopt the **Myers-Briggs Type Indicator** (MBTI), and (b) that we use the Annenberg ASAP leadership dimensions and criteria to assess the validity and reliability of current tests which may be adopted. Therefore, we have placed the **Myers-Briggs Type Indicator** (MBTI) and the **Leatherman Leadership Questionnaire** (LLQ) on the website for use by school districts and administrators and adopted the ASAP dimensions to assess the value of current tests.

Meeting Agenda. This report to the Steering Committee provides information on the following items: (a) review of experience using the **Myers-Briggs Type Indicator** (MBTI) and the **Leatherman Leadership Questionnaire** (LLQ), (b) a recommendation for development of an instrument to assess technology competencies of assesses, (c) a recommendation for adoption of the Hallenger Instructional Leadership and Managing the Learning Environment assessment, and (d) a recommendation to search for a permanent director of the Assessment and Diagnostic Center.

The report provides information to support these recommendations.

THIRD REPORT TO THE STEERING COMMITTEE

The Steering Committee received a report from the Technical Committee at its last meeting which (a) presented an evaluation of existing leadership assessment instruments in accordance with their applicability, relevance, appropriateness, and psychometric strengths given the aim of the project. Brief summaries of these instruments and development aspects appear in Appendix A. This review resulted in the recommendation by the Steering Committee of two assessment instruments by the technical committee—**Benchmarks** and the **Leatherman Leadership Questionnaire** (LLQ).

The Annenberg Governing Board reacted to the steering committee recommendations which resulted from our last meeting by asking that the Center (a) adopt the Annenberg the ASAP leadership dimensions and criteria (see Figure 1) to assess the validity and reliability of current tests which may be adopted, and (b) adopt the **Myers-Briggs Type Indicator** (MBTI) and the **Leatherman Leadership Questionnaire** (LLQ)

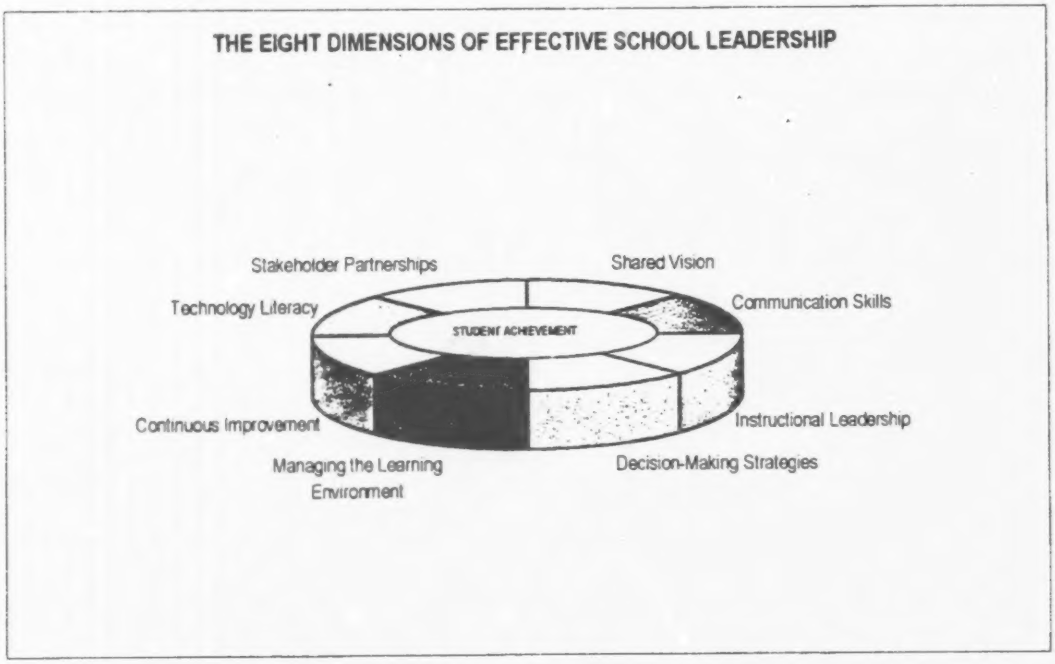
THE EIGHT DIMENSIONS OF EFFECTIVE SCHOOL LEADERSHIP
Stakeholder Partnerships
Shared Vision
Technology Literacy
Communication Skills
STUDENT ACHIEVEMENT
Continuous Improvement
Instructional Leadership
Managing the Learning Environment
Decision-Making Strategies

Figure 1: The Eight Dimensions of Effective School Leadership

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ACTIONS TAKEN SINCE THE LAST MEETING

REVIEW OF INSTRUMENTS. In order to assure effective school leadership, the Annenberg Challenge identified eight dimensions of effective school leadership. These dimensions are displayed in Figure 1.

Guided by this framework, a re-evaluation of existing leadership assessment instruments was made to determine their applicability, relevance, appropriateness, and psychometric strengths given the aim of the project. Brief summaries and development aspects of all instruments reviewed appear in Appendix A.

Adoption of Instruments. Based on the decision of the Annenberg Challenge Board, the Center has placed the **Myers-Briggs Type Indicator** (MBTI) and the **Leatherman Leadership Questionnaire** (LLQ) on the web site for use with the ASAP participants. These instruments were the **Myers-Briggs Type Indicator** (MBTI) and the **Leatherman Leadership Questionnaire** (LLQ). A brief description of each instrument, including the scales measured, are listed below:

Myers-Briggs Type Indicator. The Myers-Briggs Type Indicator (MBTI) is designed for use in a wide variety of settings, including business, counseling, and education, for personal and organizational development, team building, counseling, identification of learning styles, and many other activities.

The MBTI is not specifically a leadership assessment, but it assesses personal traits that affect the ways leaders interact with others and carry out their jobs. Form G (self-scorable) contains ninety-four items that determine preferences in four areas:

- Extraversion/Introversion (person's energy)
- Sensing/Intuition (how information is gathered)
- Thinking/Feeling (decision making)
- Judging/Perceiving (deal with environment / create lifestyle)

These four areas are further combined into sixteen personality "types." Inventory items are forced-choice, asking participants to choose between preferred behaviors or appealing words.

Form G provides brief explanations of the four major areas as well as the sixteen personality types. The publishers provide a variety of more detailed narrative reports as well as advanced versions of the instrument that provide expanded interpretations

As noted, the MBTI has many uses. School leaders may find it most useful in understanding how their actions and relationships are affected by their preferred style. The cost for the assessment per person varies by volume ($79 each for 4-10 people; $69 each for 11-25 people; and, $59 each for 26-100 people).

Current Use Of MBTI
The Myers-Briggs has been made available on-line through the company *Know-Your-Type*, and it has been administered to the first cohort (n=6). Additionally. a number of participants have completed the MBTI through their respective employers and do not have to take the assessment. A 7-page interpretive report has been received for 4 of the 6 individuals in the first cohort.

Leatherman Leadership Questionnaire:

The purpose of the LLQ is to aid in selecting leaders, providing specific feedback to participants on their leadership knowledge for career counseling, conducting accurate needs analysis, and screening for assessment centers or giving pre/post assessment feedback.

The skills assessed by the LLQ are:

- Oral Communication (21 items)
- Managing Change (20 items)
- Dealing with Employee Conflicts (10 items)
- Handling Emotional Situations (12 items)
- Conducting Employee Meetings (16 items)
- Giving Positive Feedback (9 items)
- Negotiating (18 items)
- Conducting Performance Appraisals (18 items)
- Persuading/Influencing Employees (6 items)
- Problem Solving with Employees (11 items)
- Team Building (13 items)

Feedback reports are provided for both the organization and the individual examinees. The organizational report lists each task and the scores of the group on that task. This provides a handy tool for identifying staff strengths and remediation needs. The individual reports provide task and total scores for the individual, the group taking the test, and everyone who has taken the test to date (currently 23,000 individuals). Task and total percentile scores are also computed for individual and group, based on this normative group.

Accompanying the individual results is a glossy 12-page booklet which provides an explanation and answers numerous questions. The booklet provides realistic answers to typical real-life questions. In addition, a development manual/guide (350 page) is provided.

The initial cost for setting up the LLQ was a base $1500. The cost to complete the assessment and receive feedback is $75 per person.

Current Use of the LLQ. The Leatherman Leadership Questionnaire is currently available on-line through the ASAP Portal. It has been administered to the first cohort (n=6), the second cohort (n=16), and the third cohort (n=17). Scores and feedback for the first cohort have been received by the Center and are presented in Table 1.

Table 1: LLQ Summary Report for First Cohort (n=6)

TASK	HIGHEST POSSIBLE SCORE	AVERAGE SCORE	PERCENTILE RANK	STRENGTHS AND NEEDS
Oral (one-on-one) Communication	91	59	42.4	NEED
Managing Change	78	49	38.9	NEED
Dealing with Employee Conflicts	74	57	50.3	OK
Handling Emotional Situations	65	27	52.5	OK
Conducting Employee Meetings	64	44	43.0	NEED
Giving Positive Feedback	86	56	44.0	NEED
Negotiating	66	43	47.0	OK
Conducting Performance Appraisals	79	42	36.2	NEED
Persuading/Influencing Employees	67	46	51.0	OK
Problem Solving with Employees	74	46	30.9	NEED
Team Building	82	62	54.2	OK

Of the 16 participants in Cohort # 2 ten (10), or 62.5%, have completed the LLQ. Their responses have been transmitted to International Training Consultants (ITC) for processing. Two participants have begun the questionnaire but have yet to complete it. And, the remaining two participants have not logged onto the ITC site. This data is as of September 18, 2002.

Of the 17 participants in Cohort #3 six (6), or 35.3%, have completed the LLQ, and responses have been transmitted to ITC for processing. Six (6) individuals have started the questionnaire but have yet to finish, and five (5) participants have not even accessed the site. Again, this data is as of September 18, 2002.

Validation of LLQ. A pilot study design is being developed to validate the LLQ. Once all data is received on the first three cohorts (n=39), the instrument will be able to be validated for content to determine if the questions asked are actually congruent with the definitions of the ASAP's dimensions of effective school leadership. Validity will be determined in numerous ways: (a) face validity, (b) content validity, and, thus, (c) predictive validity.

Face validity does not involve any technical test; it simply mans that a reasonably well-informed person would agree that the test appears to measure the leadership dimensions. In this case, the face validity of the LLQ will be determined by requesting mentors to agree that items in the LLQ assess the

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ASAP dimensions. If the answer is "yes," the assessment will be seen as credible. A survey-type questionnaire will be developed and distributed.

Content validity, like face validity, reflects a judgment about how well a test covers a particular domain. However, the judgment is more formal; for example, leadership experts may be asked to indicate how well the test measures essential leadership qualities. Content validity will determine if there is evidence that performance on the LLQ correlates with performance on the job.

Predictive validity is more valuable. While face validity and content validity offer some assurance of credibility, most people are even more impressed by evidence that the instrument works in the real world. If high scorers on the test turn out to be effective leaders in everyday terms, then we can used the LLQ to predict success rather than simply waiting to see what happens. By surveying subordinates to learn how they are perceived as leaders is one possible way.

Additional Assessments Needed

The MBTI and the LLQ were categorized using ASAP's eight dimensions of leadership. These results are presented in Table 2. Based on this analysis the Technical Committee determined a need to adopt, adapt or create instruments to assess instructional leadership, managing the learning environment, shared vision, and technology literacy which are not measured by the MBTI and LLQ do not measure.

--Table 2 here--

Recommendation 1: Instructional Leadership, Managing the Learning Environment, and Shared Vision. Three publicly available instruments related to the dimensions of instructional leadership, managing the learning environment, and shared vision were located and reviewed. These instruments are primarily self-rating instruments. They are the **Principal Instructional Management Rating Scale (PIMRS),** the **Instructional Leadership Inventory (ILI),** and the **Educational Administrator Effectiveness Profile (EAEP).** Individual profiles of these instruments are included in Appendix A.

Two analyses were conducted. First, the instruments were analyzed against the ASAP leadership dimensions. These results are found in Table 3

--Table 3 here--

Second, the instruments were evaluated against the same factors used for evaluating previous instruments were applied: (a) cost of use; (b) type of response scale and length of instrument; (c) psychometric properties; (d) ease of scoring; (e) ability to administer on-line; and, (f) fidelity with the leadership areas to be assessed. Table 4 presents the results of this analysis.

Table 2: ASAP Dimensions of Leadership and MBTI and LLQ

ASAP THE EIGHT DIMENSIONS OF EFFECTIVE SCHOOL LEADERSHIP								
ASSESSMENT INSTRUMENT	**Shared Vision**	**Communication Skills**	**Instructional Leadership**	**Decision Making Strategies**	**Managing the Learning Environment**	**Continuous Improvement**	**Technology Literacy**	**Stakeholder Partnerships**
MBTI								
- Extraversion / Introversion								
- Sensing / Intuition								
- Thinking / Feeling				X				
- Judging / Perceiving								
LLQ								
- Oral Communication		X						
- Managing Change						X		
- Dealing with Employee Conflicts		X						
- Handling Emotional Situations		X						
- Conducting Employee Meetings		X						
- Giving Positive Feedback						X		
- Negotiating				X				
- Conducting Performance Appraisals						X		
- Persuading / Influencing Employees		X						
- Problem Solving with Employees				X				
- Team Building								X

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Table 3: Instructional Leadership Instruments and ASAP Dimensions of Leadership

ASAP

THE EIGHT DIMENSIONS OF EFFECTIVE SCHOOL LEADERSHIP

ASSESSMENT INSTRUMENT	Shared Vision	Communication Skills	Instructional Leadership	Decision Making Strategies	Managing the Learning Environment	Continuous Improvement	Technology Literacy	Stakeholder Partnerships
EAEP								
-Setting goals and objectives						X		
-Planning						X		
-Making decisions and solving problems				X				
-Managing business and fiscal affairs					X			
-Assessing programs			X		X			
-Delegating responsibilities					X			
-Communicating		X						
-Building and maintaining relationships								X
-Demonstrating professional commitment						X		
-Improving instruction			X		X			
-Developing staff								X
PIMRS								
-Communicating the School Goals	X	X				X		
-Supervising and Evaluating Instruction			X		X			
-Coordinating the Curriculum			X		X			
-Monitoring Student Progress			X		X			
-Protecting Institutional Time			X		X			
-Maintaining High Visibility								
-Providing Incentives for Teachers			X					
-Promoting Professional Development					X			
-Developing and Enforcing Academic Standards			X		X			
-Providing Incentives for Learning								
-Framing School Goals	X					X		

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ASAP
THE EIGHT DIMENSIONS OF EFFECTIVE SCHOOL LEADERSHIP

ASSESSMENT INSTRUMENT	Shared Vision	Communication Skills	Instructional Leadership	Decision Making Strategies	Managing the Learning Environment	Continuous Improvement	Technology Literacy	Stakeholder Partnerships
ILI								
- Defines Mission	X							
- Manages Curriculum			X		X			
- Supervises Teaching			X		X			
- Monitors Student Progress			X		X			
- Promotes Instructional Climate			X					

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Table 4. Evaluation of Assessment Instruments Related to Instructional Leadership, Shared Vision and Managing the Learning Environment

INSTRUCTIONAL LEADERSHIP AND MANAGING THE LEARNING ENVIRONMENT							
Instrument	**Cost**	**Length**	**Scoring Process**	**Scale Descriptors**	**Validity**	**Reliability**	**Comments**
Principal Instructional Management Rating Scale **(PIMRS)**	$250 per year – unlimited $100 subsequent years	71 Items	Paper/pencil (possibility of on-line) Self-assessment	Communicating the School Goals Supervising and Evaluating Instruction Coordinating the Curriculum Monitoring Student Progress Protecting Institutional Time Maintaining High Visibility Providing Incentives for Teachers Promoting Professional Development Developing and Enforcing Academic Stanc Providing Incentives for Learning Framing School Goals	Content Discriminant Construct	Lowest = 0.75	Hallinger and Murphey Includes set master copies, principal self-assessment and manual.
Instructional Leadership Evaluation and Development Program **(ILEAD)** ↓ Instructional Leadership Inventory **(ILI)**	$36.75 each	100 short multiple choice (20-30 minutes)	Paper/pencil	Defines mission Manages curriculum Supervises teaching Monitors student progress Promotes instructional climate	High correlation with PIMRS .52 - .74	.74 - .89	Booklets – $1.75 each and Report Processing $35.00 ea Larry Braskamp

Table continues

Table [illegible] (continued)

Instrument	**Cost**	**Length**	**Scoring Process**	**Scale Descriptors**	**Validity**	**Reliability**	**Comments**
Educational Administrator Effectiveness Profile **(EAEP)**	$45.00 each	120 items	Vendor-scored	Setting goals and objectives Planning Making decisions and solving problems Managing business and fiscal affairs Assessing progress Delegating responsibilities Communicating Building and maintaining relationships Demonstrating professional commitment Improving instruction Developing staff	N.A.	N.A.	

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Based on these two analyses, the Technical Committee recommends that the PIMRS be adopted and digitized for placement on the ASAP portal. The PIMRS measures the instructional leader behavior of elementary and secondary school principals. It is a 71-item instrument measuring instructional leader behavior. Each item focuses on a specific job-related behavior. Subscales include: communicating the school goals; supervising and evaluating instruction; coordinating the curriculum; monitoring student progress; protecting instructional time; maintaining high visibility; providing incentives for teacher; promoting professional development; developing and enforcing academic standards; providing incentives for learning; and, framing school goals. If the recommendation of the Technical Committee is accepted, the PIMRS will be place on-line in October and will be tested with Cohorts 1,2, and 3 in November or December.

Recommendation 2: Technology Literacy. Technology competencies identified by various organizations such as ISSLC were reviewed as well as adopted competencies by Universities and School Districts. Based on this review a list of technology skills and proficiencies that administrators should possess was identified and are displayed in Table 5. These skills and proficiencies will include a writing component as well and will assess skills related to (a) word processing, (b) spreadsheets, (c) databases, and (d) telecommunications. The list is thought to be basic, meaning that if these skills and proficiencies are in place administrators may apply them to management and instructional technology applications they use manage and lead schools.

--Table 5 about here--

Table 5: Technology Skills and Proficiencies

SKILL DOMAIN	PROFICIENCIES
1.0 Word Processing	1.1 Enter ad edit text
	1.2 Copy and move blocks of text
	1.3 Change text format, style, set margin, line space and tabs
	1.4 Check spelling, grammar and word usage
	1.5 Create headers and footers
	1.6 Insert date, time, and page numbers
	1.7 Create columns in a document
	1.8 Insert clip art into a document
	1.9 Create a table in a document
2.0 Spreadsheets	2.1 Interpret information in an existing spreadsheet
	2.2 Create a spreadsheet with rows, columns and headings
	2.3 Enter data in an existing spreadsheet
	2.4 Create a graph from spreadsheet data
	2.5 Insert a spreadsheet into a word processing document
3.0 Database	3.1 Sort a database by specific fields, add/delete record
	3.2 Create database with multiple fields and records
	3.3 Create custom layouts including columnar reports
4.0 Telecommunications	4.1 Connect to the Internet or an on-line service
	4.2 Use electronic mail (compose, send, retrieve, respond)
	4.3 Access and use resources on the Internet
	4.4 Upload a text file and send as electronic mail
	4.5 Create and use group addresses for electronic mail
	4.6 Read, save, print, reply to, forward electronic mail

The technical committee recommends development of an instrument to assess the dimension of technology literacy. The technology component will include a writing component as well and will assess skills related to (a) word processing, (b) spreadsheets, (c) databases, and (d) telecommunications. The assessment instrument is currently under construction. Software (Perseus) has been requested for purchase and the instrument design has been initiated. The first assessments are scheduled to be completed and housed on the ASAP portal by mid October. The final product will assess all the skills and proficiencies identified in Table 4. When a participant successfully completes the assessment they will receive a certificate of proficiency. The full technology assessments will be placed on the ASAP Portal by January 1, 2003.

Recommendation 3: Permanent director of the Assessment and Diagnostic Center. The developmental work that the Florida Annenberg Challenge requested is nearing completion. By February 1, 2003, there 5 requested will be in place on the ASAP Portal. These assessments provide candidates information about (a) personality traits related to leadership, (b) transformational leadership potential, (c) leadership skills, (d) written and oral communication skills, and (e) decision-making and task prioritization abilities.

The instruments will be used to screen potential administrators and determine their leadership development needs. The use of these instruments for such a purpose are contingent upon school district support and adoption. As the work of

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the Center moves to this level, a Center Director with skills to market the Center's products, create a delivery system, and mentor participants will be needed. If further assessment development work is deemed necessary in the future, the Director can create contracts with developers for the work.

The Technical Committee therefore recommends the employment of a full time director to lead the Center to the next stage of development. A position description is provided in Appendix B for the Steering Committee's review and suggestions. If this recommendation is accepted, a search committee will be formed to review applicants and make a recommendation to the steering committee.

APPENDIX A

INSTRUMENT		©	VENDOR
Acumen Leadership Skills	ALS	1985	Acumen International
Acumen Leadership Workstyles	WkStyles	1997	Center for Leadership Development
Administrative Stress Index	ASI	1993	Gmelch
Administrator Professional Leadership Scale	APLS		Thompson (ETS)
Benchmarks	Bench	1994	Center for Creative Leadership
Big Five Locator	BFL	1996	Pfeiffer, J.W. (ETS)
The Big Five Personality Test	BFPT	2000	Sulloway
Campbell Leadership Index	CLI	1991	NCS Assessments
Campbell Organizational Survey	COS	1995	NCS Assessments
Campbell Skills Survey	CSS	1968	Human Synergistics International
Compass: Managerial Practices Survey	CMPS	1995	Manus - Div of Right Mgt. Cons.
Critical Thinking Test	CTT	1993	Saville and Holdsworth Ltd.
Decision-Making Inventory	DMI	1983	Marathon Consulting and Press
Denison Leadership Development Survey	DLDS	1998	Denison, D. & Neale, W. (ETS)
Developing the Leader Within	DLW	1995	Mind Garden Inc.
Diagnostic Assessment of School and Principal Effectiveness	DASPE	1990	KanLEAD Educational Consortium
Dimensions of Leadership Profile	DLP	1994	Inscape
Executive Success Profile	ESP	1993	Personnel Decisions International
Five Star Supervisor Leadership Skills Inventory	FSSLSI	1992	Talico, Inc.
Fundamental Interpersonal Relations Orientation: Behavior	FIRO-B	1996	Consulting Psychologistics, Press
Influence Styles Inventory	ISI	1997	HRD Press
Instructional Leadership Inventory	ILI	1993	Maehr, M & Ames, R. (ETS)
Leader Adaptability and Style Inventory	LASI	1990	Hersey & Blanchard
The Leadership and Management of Schools	LMS	1991	Blanchard Training and Development
Leadership Assessment Instrument	LAI	1998	Bennis
Leader Attributes Inventory	LAI	1992	Moss, Jerome, et.al. (ETS)

APPENDIX A

INSTRUMENT		©	VENDOR
Leader Authenticity Scale	LAS	1991	Henderson and Hoy (ETS)
Leadership Behavior Analysis II	LBA-II	1991	Blanchard Training & Dev't, Inc.
Leadership Behavior D Questionnaire	LBDQ	1997	HRD
Leadership Behavior Questionnaire	LBQ	1993	Human Resource Dev't Press
Leadership Characteristics & Skills Survey	LCSS	1995	Research Training and Dev't
Leadership Dimensions Survey	LDS	1999	Miller, G.V. (ETS)
Leadership Effectiveness Analysis	LEA	1993	Management Research Group
Leadership Grid	grid	1991	(Blake & McCanse)
Leadership Impact	L/I	1995	Hum Synergistics/Center for Applied Research
Leadership Practices Inventory – Delta	LPI-D	1992	Kouzes and Posner (University Associated Press)
Leadership Practices Inventory	LPI	1993	Pfeiffer & Co, Int'l Publishers, Inc
Leadership Qualities Scale	LQS	1990	Talico, Inc.
Leadership Questionnaire	LQ	1993	Bass, B.M. (ETS)
Leadership Rating Scale	LRS	1942	Benge, E.J. (ETS)
Leadership Report	LR	1995	Manus: Div of Right Management
Leadership Skills Assessment	LSA	1991	(www)
Leadership Skills Inventory	LSI	1985	PRO-ED Inc.
Leadership Skills Test	LST	1996	Talico, Inc.
Leadership Sphere Inventory	LSph I	1991	Development Dynamics (ETS)
Leadership Strategies Inventory	L Str I	1990	Organizational Design and Development, Inc.
Leadership Styles Inventory	LSI	1994	Human Synergistics International
Leadership Style Survey	LSS	1979	Learning Dynamics, Inc.
Leadership Trait Questionnaire	LTQ	1985	Hum Synergistics/Center for Applied Research
Least Preferred Co-Worker Measure	LPC	1993	Acumen International
LMX 7	LMX 7	1995	Pfeiffer & Co, Int'l Publishers, Inc
Leatherman Leadership Questionnaire	LLQ	1992	Leatherman, R.W. (ETS)

APPENDIX A

INSTRUMENT		©	VENDOR
Management Behavior Assessment Test	MBAT	1994	Talico, Inc.
Management Opinionnaire	MO	1980	Sistrunk, W.E. & Jenkins, E.R. (ETS)
Management Practices Inventory	MPI	1987	Talico, Inc.
Management Practices Questionnaire	MPQ	1988	Organizational Performance Dimensions
Management Practices Survey	MPS	1989	Personnel Decisions Int'l
Management Roles Inventory	MRI	1995	HRD Press
Manager View / 360	MV-360	1995	Org Performance Dimensions
Matrix: The Influence Behavior Quest.	Matrix	1968	Human Synergistics International
Management Effectiveness Profile System	MEPS	1993	Mind Garden
Myer Kendall Assessment Survey (MKAS)	MKAS	1991	Western Psychologist Services, Inc.
Multi-Factor Leadership Questionnaire	MLQ	1989	Personnel Decisions Int'l
Multiple Management Styles Inventory	MMSI	1987	Smith, A.U. (ETS)
My Best Leadership Style	MBLS	1994	Associated Consultants in Education
Organizational Commitment Questionnaire	OCQ	1985	(Mowaday) (ETS)
Path/Goal Leadership Questionnaire	PGLQ	1993	Human Synergistics International
Personality Advantage Questionnaire	PADV	1999	HRD Press
Personality Profile Inventory	PPI	1986	Smith, A.W. (ETS)
Personal Profile System	PPS		Inscape Publishing
Personal Styles Inventory	PSI	1994	Kunce, J.T. (ETS)
The Preferred Leadership Style of Superintendents	PLSS	1980	Sistrunk, W.E. & Jenkins, E.R. (ETS)
Principal Leadership and Self Appraisal of Effectiveness	PLSAE	1986	Miserandino (ETS)
Problem-Solving Skills Questionnaire	PSSQ	1989	Pfeiffer & Company International Publishers, Inc.
The Profiler	Profile	1983	Center for Creative Leadership
Prospector	Prospect	1994	The Clark Wilson Group, Inc
Rahim Organizational Conflict Inv II	ROCI-II	1993	Technomic Publishing
School Administrator Assessment Survey	SAAS	1985	ETS
School Administrator Skills	SAS	2001	NASSP

APPENDIX A

INSTRUMENT		©	VENDOR
Situational Leadership II: Leadership Skills Assessment	SL-II	1991	Blanchard
Sixteen (16) Personality Factors	SPF	1993	Cattell, R.B. et.al (ETS)
Skills and Attributes Inventory	SAI	1993	
SMT Leader Survey	SMT	1994	Burress, A. (ETS)
Styles of Leadership Inventory	SLI	1968	Telometrics International Inc.
Superior Management Practices Questionnaire	SMPQ	1987	Talico, Inc.
Supervising Behavior Description Questionnaire	SBDQ	1994	Org Performance Dimensions
Supervisory Aptitude Test	SAT	1990	Talico, Inc.
Supervisory Practices Survey	SPS	1987	Talico, Inc.
Supervisory Skills Aptitude Test	SSAT	1990	Talico, Inc.
Supervisory Skills Test	SST	1989	Talico, Inc.
Supervisory Styles Inventory	SSI	1987	Talico, Inc.
Survey of Educational Leadership Practices	SELP	1955	Nelson, C.W. & Valenti, J.J. (ETS)
Survey of Executive Leadership	EXEC	1997	The Clark Wilson Group, Inc.
Survey of Leadership Practices	SLP	1991	The Clark Wilson Group, Inc
Survey of Management Practices	SMP	1995	R.J. Koenigs, SYMLOG Consulting
System for Multi-Level Observation of Groups	SYMLOG	1995	Team Management Systems
Taking Your Leadership Temperature	TYLT	1982	Ernest, B. (ETS)
Team Leader Skills Assessment	TLSA	1992	Talico, Inc.
Team Performance Questionnaire	TPQ	1998	Pfeiffer
Teamwork	TW	1992	Talico, Inc.
Time Management	TM	1986	Talico, Inc.
Time Management Inventory	TMI	1987	Talico, Inc.
Time Management Personality Profile	TMPP	1995	Seif, D. (ETS)
Types of Work Index	TWI	1993	Lominger Limited, Inc
The Visionary Leader: Leader Behavior Questionnaire	VL:LBQ	1997	Organizational Design and Development

APPENDIX A

INSTRUMENT		©	VENDOR
VOICES	**Voices**		Acumen International
Work Commitment Index	**WCI**	1993	(Blau, GJ)

INSTRUMENT PROFILES

Acumen Leadership Skills

Acumen
4000 Civic Center Drive
5th Floor
San Rafael, CA 94903
Phone: 800-544-8626
FAX: 425-479-5358
Email: acumen@acumen.com
www.acumen.com
Contact: Jeannie Elrod

Purpose

Leadership Skills seeks to stimulate leadership development by informing leaders of their skills in major leadership domains.

Target Group

Leaders of organizations in a wide range of industries, including education.

Description

Leadership Skills is a multi-rater instrument that provides feedback on sixteen leadership skills in four domains: task management (informing, efficiency, planning, and problem-solving); team development (performance, feedback, relationship skills, staff development, and team motivation); business values (quality improvement, customer focus, and promoting innovation): and leadership (accountability, empowerment, influence, mission skills, and networking). The instrument contains 96 items using a 5-point Likert scale ranging from 1 ("never") to 5 ("always").

Feedback

Participants receive graphic and narrative feedback, including summary results and item-by-item breakouts comparing self-scores and ratings by others. Detailed interpretive information is provided.

Follow up

The feedback report includes many activities and ideas for using the results for professional development.

Theory and Rationale

Not provided in review materials.

Administration

Can be self-administered. Scoring provided by publisher.

Statistical Validation

Not provided with review materials.

Uses

The most appropriate use is for professional development.

Cost

Cost varies from $145 to $185 depending on quantity, processing, and the method selected to capture data.

Acumen Leadership Workstyles

Acumen
4000 Civic Center Drive
5th Floor
San Rafael, CA 94903
Phone: 800-544-8626
FAX: 425-479-5358
Email: acumen@acumen.com
www.acumen.com
Contact: Jeannie Elrod

Purpose

Workstyles seeks to stimulate leadership development by informing leaders of their characteristic styles.

Target Group

Leaders of organizations in a wide range of industries, including education.

Description

Workstyles is a 96-item multi-rater instrument that provides feedback on twelve stylistic dimensions: humanistic-helpful, affiliation, approval, conventional, dependence, apprehension, oppositional, power, competition, perfectionism, achievement, and self-actualization. (A version of the instrument may be taken online at Acumen's website.)

Feedback

Participants receive graphic and narrative feedback, with an emphasis on showing how their style helps and hinders four major management functions: managing tasks managing people, managing conflicts, and influencing/leading others. The report also summarizes perceptions of other raters and provides a comparative analysis.

Follow up

The feedback report includes brief suggestions about using the results to increase managerial effectiveness.

Theory and Rationale

Not provided in review materials

Administration

Can be self-administered. Scoring provided by publisher. Takes about 15 minutes to complete.

Statistical Validation

Not provided with review materials.

Uses

The most appropriate use is for professional development

Cost

$175 per manager. Acumen will perform the report processing for an additional fee, or clients can purchase the scoring/report generator software.

Administrative Stress Index

Gmelch, W.H.

Purpose

Identifies major sources of stress.

Target Group

Administrators and leaders

Description

The 35-item ASI identifies major sources of administrators' stress by establishing clear categories of occupational stressors (stress-inducing situations).

Feedback

Not provided with review materials.

Follow up

Not provided with review materials

Theory and Rationale

Ogden (1992); Gmelch and Burns (1991)

Administration

Self-administered and self-scored.

Statistical Validation

The development of the ASI provides evidence for its content validity.

Uses

Determines management team stressors and their impact on administrators' health.

Cost

Not available.

Benchmarks

Center for Creative Leadership
P.O. Box 26300
Greensboro, NC 27438
Phone: 336-288-7210
FAX: 336-288-3999
www.ccl.org

Purpose

Benchmarks is a professional-development instrument designed to measure strengths and weakness of executives.

Target Group

Middle- and upper-level executives.

Description

Benchmarks consists of 164 items. The largest section yields feedback in sixteen categories. Four are in the area of "meeting job challenges": resourcefulness, doing whatever it takes, being a quick study, and decisiveness.

Five are in the area of "leading people": leading employees, setting a developmental climate, confronting problem employees, work team orientation, and hiring talented staff.

Seven are in the area of "respecting self and others": building and mending relationships, compassion and sensitivity, straightforwardness and composure, balance between personal life and work, self-awareness, putting people at ease, and acting with flexibility.

Another section generates feedback on six "problems that can stall a career": problems with interpersonal relationships, difficulty in molding a staff, difficulty in making strategic transitions, lack of follow-through, overdependent, and strategic differences with management.

A third section yields information on how the leader handles a variety of typical business assignments, and the final section asks raters to identify which eight (out of sixteen) success factors are most important in their organization.

Response forms are provided for the leader and eleven observers (supervisors, peers, and subordinates). Responses are on a five-point Likert scale, ranging from "not at all" to "a very great extent" on the first section. The scale on the second section (derailment factors) ranges from "strongly disagree" to "strongly agree," while the third section (abiolty to handle various jobs) ranges from "among the worst" to "among the best."

Feedback

Participants are given a feedback report divided into three sections: leadership skills and perspectives, problems that can stall a career, and handling challenging jobs. Feedback includes average ratings by self and others; comparison of rating to norm groups; importance ratings; and an item-by-item breakdown. The report also highlights the fifteen highest and lowest rated items within each rating group, as well as items where the range of responses was three points or higher within the same group of raters. Norms are based on a sample of high-level or mid-level managers, depending on the level of the person being rated.

Follow up

The publishers provide a developmental learning guide that helps participants analyze their results, set a developmental goal, choose a strategy, and implement the plan. The Center for Creative Leadership also offers developmental workshops.

Theory and Rationale

Benchmarks is based on research on the developmental experiences of business managers in Fortune-500 firms. Interviews and surveys asked executives to describe key events in their managerial careers and what they had learned from these experiences. The results led to sixteen categories of key developmental events, as well as six factors that can cause "derailment."

Administration

Tests can be self-administered. Scoring is done by the publisher, though scoring software can be licensed. The Center for Creative Leadership requires certification for training and facilitators who will be giving feedback.

Statistical Validation

Not provided with review materials

Uses

Most appropriately used for professional development of experienced managers.

Cost

A set of Benchmarks instruments, which includes twelve surveys to assess on Profess

Big Five Locator

Educational Testing Service
Pfeiffer, J.W. (Author)
Rosedale and Carter Roads
Princeton, NJ 08541
Phone: 609-734-5689

Purpose

Comprehensive assessment of normal adult personality and assessment of team traits.

Target Group

Adults

Description

The Big Five Locator is designed to provide a comprehensive assessment of normal adult personality. The instrument is based on the traditional five-factor model of personality. The bipolar factors measured are: negative emotionality (resilient, responsive, reactive); extraversion (introvert, ambivert, extravert); openness (preserver, moderate, explorer); agreeableness (challenger, negotiator, adapter); and conscientiousness (flexible, balanced, focused).

The test consists of 25 adjective pairs that represent opposite poles of a single continuum. Respondents rate themselves on a five-point scale on each item.

Feedback

Not available

Follow up

Not available

Theory and Rationale

None cited.

Administration

The Big Five Locator may be administered to individuals alone or in groups. There is no time limit on the test, but most respondents complete it in less than two minutes.

Statistical Validation

Not available with review materials.

Uses

Suggested for use by consultants and trainers who want a quick evaluation of clients' personalities.

Cost

Not available

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Campbell Leadership Index

NCS Assessments
5605 Green Circle Drive
Minnetonka, MN 55343
Phone: 800-627-7271

Purpose

The CLI is an adjective checklist designed to assess leadership characteristics in individuals.

Target Group

Students and adults seeking feedback on their leadership characteristics.

Description

An adjective checklist designed to assess leadership characteristics, such as Dynamic, Empowering, Productive, and Trusting. Respondents indicate how descriptive each adjective is of them—rated on a 6-point scale. From 3 to 5 observers also rate the respondent on these same characteristics.

The CLI contains 100 adjectives (both positive and negative) that are often associated with leadership. The adjectives form 22 scales (ambitious, daring, dynamic, enterprising, experienced, entertaining, friendly, farsighted, original, persuasive, energy, affectionate, considerate, empowering, credible, organized, productive, thrifty, calm, flexible, optimistic, trusting) that are grouped into the 5 major orientations listed above.

Feedback

Participants receive a 21-page feedback report displaying both self- and observer ratings on the orientations, scales, and items. Graphs are used throughout the feedback to display these data. All the ratings are shown as standard scores, where a score of 60 or higher is very high and a score of 40 or lower is very low.

Follow up

Development and planning guide contain definitions of the items and scales and detailed interpretation of the results. Worksheets are provided to help participants develop an action plan.

Theory and Rationale

The CLI is based on a list of adjectives that reflect various dimensions of leadership. The adjective list was derived from theory and research about leadership.

Administration

Must be certified to administer. Can be completed in 20-30 minutes.

Statistical Validation

High validity and reliability

Uses

Professional development

Cost

1-49	$165 per set
50-249	$150
250 +	$135

Campbell Organizational Survey

NCS Assessments
5605 Green Circle Drive
Minnetonka, MN 55343
Phone: 800-627-7271

Purpose

Assesses employee attitudes toward organizations

Target Group

Adults

Description

A paper-pencil 67-item test with 17 scales plus an overall index. A sixth grade reading level is required. Examiner must have taken psychology courses. Available also in Spanish and French.

Feedback

Computer scored; test scoring services available from publisher

Follow up

None mentioned in review materials

Theory and Rationale

Not available

Administration

Self-administered; suitable for group use; untimed

Statistical Validation

Not available with review materials.

Uses

Professional development

Cost

Varies with volume

COMPASS: The Managerial Practices Survey

Manus Associates
100 Prospect Street
South Tower
Stamford, CT 06901
Phone: 800-445-0942
FAX: 336-288-3999
Email: manus1@aol.com
www.rightmanus.com
Contact: Debbie Horne

Purpose

COMPASS provides information on current leadership behavior to assist in professional development.

Target Group

Managers at all levels in business, public, and military organizations.

Description

COMPASS consists of seventy items providing feedback in four clusters containing fourteen scales: communicating (informing, clarifying, monitoring), decision-making (planning, problem-solving, consulting, delegating), motivating (inspiring, recognizing, rewarding), and building relationships (supporting, mentoring, networking, teambuilding). Respondents are asked to rate behavior, ranging from 1 ("never, not at all") to 4 ("usually, to a great extent"), with "not applicable" and "don't know" responses allowed.

Leaders rate themselves and are also provided feedback from up to eight peers and subordinates. Leaders and their supervisors are also asked to rate the importance of each category for the particular setting.

Feedback

Results are reported numerically and graphically. Feedback includes an overall score for each scale as well as results for individual items, with side-by-side comparisons of assessments by self, colleagues, and subordinates ("direct reports"). Feedback on delegating, rewarding, and mentoring is provided only from subordinates. Importance ratings by supervisor and self show the relative importance of each category for the work environment.

Follow up

Development and planning guides are available to help participants understand the fourteen practices and put them into action. Developmental workshops are also available from the publisher.

Theory and Rationale

COMPASS was developed from an extensive research program headed by Gary Yukl, using factor analysis, judgment, and deduction to create a taxonomy of behaviors related to managerial effectiveness.

Administration

COMPASS is self-administered, taking about twenty to thirty minutes to complete. Scoring is done by the publisher and reported in about two weeks. Users must be certified by Manus, which offers certification workshops.

Statistical Validation

Ratings of internal consistency and test-retest reliability are high, with internal reliability ranging from moderate to high. Studies indicate that some of the scales correlate significantly with performance on the job; three scales (clarifying, monitoring, and networking) have been found to correlate with effectiveness for elementary principals.

Uses

COMPASS is most appropriately used as a professional-development tool to help leaders understand and improve their managerial practices.

Cost

COMPASS is priced at $225 a set for 1-50 sets, $200 for 51-100 sets, $180 for more than 100 sets. A set consists of self-assessment instrument, eight copies of peer and subordinate instruments, an importance questionnaire for the supervisor, publisher scoring of the results, a computer-generated feedback report, and a manual.

The Comprehensive Leader

HRDQ
2002 Renaissance Boulevard #100
King of Prussia, PA 19406-2756
Phone: 800-633-4533
FAX: 800-633-3683
www.hrdq.com
Contact: Laurie Ribble Libove (LRLIBOVE@HRDQ.com

Purpose

The Comprehensive Leader is designed to help participants identify their strengths in the area of strategic and visionary leadership and formulate professional-development plans.

Target Group

Leaders in many types of organization, profit or nonprofit. The assessment is not limited to those with formal supervisory authority over the people they are leading.

Description

The Comprehensive Leader consists of forty items assessing the leader in four areas: knowledge of self, knowledge of others, knowledge of the organization, and knowledge of the world. Respondents are asked to indicate the degree to which the statement is true of them: completely characteristic, mostly characteristic, somewhat characteristic, mostly uncharacteristic, or completely uncharacteristic. Related surveys are available for observers (peers, subordinates, or supervisors).

Feedback

Test-takers are given scores in each of the four dimensions, ranging from 10-50; scores of 40 or above are considered to be "relative strengths." (If no dimension has a score above 40, the one with the highest subtotal is designated a relative strength.) The publishers note that norms have not yet been established and that the cutoff score of 40 should be regarded as an estimate.

Scores may show strengths in from one to four dimensions, in differing combinations. For example, a participant may have strengths in "knowledge of self" and "knowledge of the world." For each of the fifteen possibilities there is a profile consisting of a one-paragraph description and several questions focused on continuing growth.

Follow up

Participants receive a booklet containing explanations of the scores and suggestions for acting on the insights gained through the assessment. A facilitator's guide includes instructions for presenting a feedback session, transparency masters, and additional development activities.

Theory and Rationale

The Comprehensive Leader was designed as an "easy-to-train" model focused on the essentials of visionary leadership. A review of the leadership literature identified more than 150 key leadership behaviors that were sorted into categories. After additional analysis, the test developers formulated a leadership model around four major dimensions: knowledge of self, knowledge of others, knowledge of the organizations, and knowledge of the world. The assumption is that the leader's awareness of these four dimensions is the root of personal conviction and earned credibility.

Administration

The instrument can be self-administered and self-scored. The instrument takes about ten minutes, scoring five to ten minutes, profile development about fifteen minutes.

Statistical Validation

Not provided with review materials. The publishers note that data collection is ongoing.

Uses

Most appropriately used for leadership development.

Cost

A preview pack containing test booklet, feedback form, and facilitator's handbook is available for $45. Five packs of both the participant form and feedback form cost $40, with quantity pricing available.

Critical Thinking Test

Saville and Holdsworth, Ltd.

Purpose

Measures ability to evaluate the logic of various kinds of arguments.

Target Group

Adults with some college background; ages 16-adult.

Description

The CTT consists of two tests designed for use in the selection, development, or guidance of higher level managers or technical specialists. The two tests are Verbal Critical Reasoning (VCT1) and Numerical Critical Reasoning (NCT1). The VCT1 measures ability to evaluate the logic of various kinds of arguments, especially the application of that ability in a realistic context. It consists of 13 passages, each followed by 4 statements, on which the candidates are to indicate agreement, disagreement, or need for more information.

The NCT1 is a skills test intended to measure a candidate's ability to cope with figures in a practical and realistic context. The NCT1 consists of a number of tables of statistical information and 40 multiple-choice questions. The format has a very clear relevance to management decision-making and to any job in which inferences have to be made from numerical or statistical data.

Feedback

Manual and user's guide.

Follow up

None reported.

Theory and Rationale

Not available.

Administration

The VCT1 takes 25 minutes; the NCT1 takes 35 minutes. Hand key; machine scored; scoring service available,

Statistical Validation

Not available.

Uses

For use in selection, development, or guidance of higher level managers.

Cost

Not reported. Contact publisher

Decision Making Inventory

Marathon Consulting and Press

Purpose

Designed to assess an individual's preferred style of decision making.

Target Group

High school and college, working adults.

Description

Consists of 20 items, but only 12 are scored so that each of the four scales is based on only three items. The items are standard personality type items, each to be responded to on a 6-point scale where only the end points are labeled.

Feedback

Grids.

Follow up

Not available.

Theory and Rationale

The DMI is intended to operationalize a theoretical model (Johnson, 1978). Based on Johnson's work in a college counseling center, proposes that there are two basic processes of gathering information—spontaneous and systematic—two basic processes of analyzing information—internal and external.

Administration

Examiner required; suitable for group use; untimed; time varies.

Statistical Validation

Low reliability. Validity data is scant.

Uses

Used for leadership development.

Cost

Kit (manual, 2 scoring grids, 25 inventories) $35
50 inventories $28

Denison Leadership Development Survey

Educational Testing Service
Denison, D. & Neale, W. (Author)
Rosedale and Carter Roads
Princeton, NJ 08541
Phone: 609-734-5689

Purpose

Provides feedback on specific management practices that can impact organizational performance.

Target Group

Leaders and managers.

Description

The DLDS provides leaders and managers with feedback on how their specific management practices can impact organizational performance. The survey consists of 96 items rated on a 7-point Likert type scale. It measures and compares specific aspects of an individual manager's leadership skills and practices to other higher and lower-performing leaders and compares the manager's self-perception to that of his or her coworkers' perceptions. The survey uses a set of 12 leadership skills and links them to four cultural traits.

Feedback

Not reported in review materials.

Follow up

Not reported in review materials.

Theory and Rationale

Not reported in review materials.

Administration

Not reported.

Statistical Validation

Not reported.

Uses

Professional development.

Cost

Not available.

Developing the Leader Within

Mind Garden, Inc.
P.O. Box 60669
Palo Alto, CA 94306
Phone: 415-424-8493
FAX: 415-424-0475

Purpose

Assesses leadership skills levels; used in psychology and leadership development.

Target Group

Adults.

Description

Likert scale 45-item test covering Developing Within, Helping Others Excel, Improving Critical Processes, and Showing Commitment to the Team.

Feedback

360-degree feedback used.

Follow up

Not reported with review materials.

Theory and Rationale

Not reported with review materials.

Administration

Individual administration; untimed; 15 minutes; computer scored.

Statistical Validation

Not reported.

Uses

Professional development.

Cost

Multi-rater	$125
Single Version	$30

Diagnostic Assessment of School and Principal Effectiveness

Kan LEAD Educational Consortium
Technical Assistance Center
820 Quincy, Suite 200
Topeka, KS 66612

Purpose

The DASPE measures school and principal effectiveness.

Target Group

School principals

Description

Five instruments are included: parents, students, teachers, the principal, and the principal's supervisor. Each is asked a series of questions related to the outcomes and processes of a particular school and how the principal functions. Forty factors related to school effectiveness and leadership are measured.

Feedback

Not included in review materials.

Follow up

Not included in review materials.

Theory and Rationale

Not included in review materials.

Administration

Not included in review materials.

Statistical Validation

Not included in review materials.

Uses

This instrument is used to identify relative strengths and weaknesses as a first step toward establishing school and principal improvement plans.

Cost

Contact publisher.

Dimensions of Leadership Profile

Inscape Publishing
Minneapolis, Minnesota, USA

Purpose

Identifies preferences for leadership style.

Target Group

Adults in leadership and supervisory positions.

Description

DLP is a 12-item survey scoring leadership preferences on twelve scales: Integrity, Self-renewal; Fortitude; Perceiving, Judgment; Performing; Boldness; Team Building; Collaboration; Inspiring; Serving; and, Enthusiasm. Identifies respondent's preference for one of four roles: analysis, accomplishment, interaction, or character.

Feedback

Leadership Grid

Follow up

None

Theory and Rationale

Some presence of supporting research in the professional literature.

Administration

Self-scored

Statistical Validation

Test – Retest Reliability high; Cronbach's alpha coefficient .61-.80;
No validity data available.

Uses

Professional growth and development planning.

Cost

$15.50

Educational Leadership Practices Inventory

Management Research Associates

Purpose

Reflects ideal versus actual attitudes for individual and group teaching style patterns.

Target Group

Teachers and administrators.

Description

The ELPI is a self-scored survey consisting of 50 problem situations. Each problem has tow practices offered as choices. The respondent must choose the ideal practice and the actual practice. The 50 problem situations are categorized into four styles of leadership. After categorizing the responses, teams of participants are formed to discuss the various categories and leadership styles.

Feedback

Group profiles can be determined and the scores in each area can be compared to a table of ideal scores for various known groups such as police department heads, auto manufacturing organizations, and route sales organizations.

Follow up

Manual for administration, analysis, and interpretation contains the directions, explanations, and tables for interpretation.

Theory and Rationale

Not included in review materials.

Administration

Self-scored

Statistical Validation

No statistical information concerning reliability and validity are included.

Uses

Intended for in-service workshops.

Cost

Not available

Executive Success Profile

Personnel Decisions International
2000 Plaza VII Tower
45 South Seventh Street
Minneapolis, MN 55402-1608

Purpose

Assesses executive skills.

Target Group

General managers.

Description

Provides feedback to general managers and executives about their performance form their peers, subordinates, and superiors. Useful to established and new executives seeking to improve their performance and skills and to organizations wishing to assess executive skills and identify succession planning needs.

Feedback

360-degree feedback

Follow up

Not reported in review materials.

Theory and Rationale

Not reported.

Administration

Self-administered.

Statistical Validation

Not available.

Uses

Identification and planning needs.

Cost

Not reported; contact publisher.

Educational Administrator Effectiveness Profile

Human Synergistics International
39819 Plymouth Road
Plymouth, MI 48170
Phone: 734-459-1030
FAX: 734-459-5557
www.humansyn.com

Purpose

This Educational Administrator Effectiveness Profile is designed to help school administrators understand their managerial and leadership behaviors and develop their skills in those areas.

Target Group

K-12 school administrators

Description

The instrument consists of 120 items using a seven-point Likert scale ranging from "almost never" to "always." Questionnaires are provided for the leader and for others (supervisors, peers, and/or subordinates.) Most of the questions measure eleven specific management skills: setting goals and objectives, planning, making decisions and solving problems, managing business and fiscal affairs, assessing progress, delegating responsibilities, communicating building and maintaining relationships, demonstrating professional commitment, improving instruction, and developing staff.

In addition, ten questions lead to "summary perceptions" about leadership, including "have a vision of what could be and help others work toward it," "convince staff that their effort makes a difference," and "provide a work environment where people care about each other."

Feedback

Participants receive graphic and numeric feedback on summary perceptions and the eleven managerial skills (for "self" and "other" ratings". Item-by-item breakdowns are also available.

Follow up

The publishers provide a self-development guide containing detailed discussions and interpretations for each of the eleven management skills, as well as advice on formulating an action plan for personal improvement.

Theory and Rationale

Not provided with review materials. The self-development guide notes that the eleven categories of managerial skill were developed through extensicve research.

Administration

Not provided with review materials.

Statistical Validation

Not provided with review materials.

Uses

Most appropriate for leadership development in K-12 settings.

Cost

The cost is $45 for a package of the profile instruments.

Five Star Supervisor Leadership Skills inventory

Talico, Inc.
2320 S. Third Street
Jacksonville Beach, FL 32250

Purpose

Assesses personal leadership behavior, skills and practices.

Target Group

First-and Second-level supervisors and managers.

Description

Provides feedback to supervisors and managers so the can compare their personal leadership behavior, skills, and practices with those that are characteristic of superior supervisors and managers. Consists of 28 items and uses a rating scale that measures the respondent's perceptions about certain aspects of personal leadership behavior, skills, and practices. These aspects relate to the primary qualities which include pride and confidence, work ethics, work standards, teamwork, values, creativity, and leadership.

Feedback

Narrative.

Follow up

Not available.

Theory and Rationale

Not reported in review materials.

Administration

Self-administered; approximately 20 minutes.

Statistical Validation

Not reported with review materials.

Uses

Developmental purposes only.

Cost

Contact publisher.

Fundamental Interpersonal Relations Orientation: Behavior

Consulting Psychologistics, Press

Purpose

Measures a person's typical behavior toward other people, specifically in the areas of inclusion, control and affection, with the emphasis on interpersonal behavior.

Target Group

Leaders.

Description

FIRO is used to measure how an individual thinks he/she acts in interpersonal situations and to facilitate the prediction of interaction between people. In each item the subject is presented with a statement concerning behavior and asked to rate on a six-point scale the frequency of his/her behavior in relationship to the presented statement.

Feedback

Clinical Interpretation

Follow up

Not reported.

Theory and Rationale

Not reported.

Administration

Untimed, group administered.

Statistical Validation

Not reported.

Uses

Professional development.

Cost

Contact publisher.

Influence Styles Inventory

HRD Press
22 Amherst Road
Amherst, MA 01002

Purpose

Identifies managers' styles and strategies used in day-to-day problems.

Target Group

Managers.

Description

The ISI helps identify and examine managers' styles and strategies used in approaching day-to-day problems. The ISI consists of 12 brief cases, each of which describes a particular management problem situation in which a manager might try to influence another person. For each case, there are two possible actions, and the respondent must select the one that is the more desirable in the manager's view.

Feedback

Booklet containing interpretation and scoring instructions.

Follow up

None reported.

Theory and Rationale

Not reported in review materials.

Administration

Self-administered.

Statistical Validation

Not available.

Uses

Professional development planning.

Cost

Contact publisher.

Instructional Leadership Inventory

Meritech, Inc.
111 North Market Street
Champaign, IL 61820

Purpose

Provides information from multiple perspectives concerning the instructional leadership, job satisfaction and commitment, and school culture or climate of an educational setting.

Target Group

School principals

Description

The ILI consists of 100 short, multiple-choice items that assess the following five broad, yet related, categories of instructional leadership: Defines Mission, Manages Curriculum, Supervises Teaching, Monitors Student Progress, and Promotes Instructional Climate.

Completed by the principal as a self-report measure. One of three leadership and school climate assessment instruments in the Instructional Leadership Evaluation and Development Program (ILEAD).

Feedback

Reports of results are obtained through mail-in processing or by using purchased software.

Follow up

None available.

Theory and Rationale

Categories developed upon dimensions of instructional leadership identified by Kroeze (1984), Murphey (1988), and Rogus (1983).

Administration

Self-ratings by principals. Appears relatively easy and efficient. Software programs and instructions provided.

Statistical Validation

Supported by the fairly strong positive correlations reported among the five dimensions (.52 - .74). Internal consistency reliability .74 - .89.

Uses

Assessment of instructional leadership behavior and professional development of principals.

Cost

$20 per test (online)

Leader Adaptability and Style Inventory

Blanchard Training and Development
125 State Place
Escondido, CA 92029
Phone: 800-728-6000
FAX: 619-489-8407
www.blanchardtraining.com

Purpose

Assesses a person's leadership in many situations.

Target Group

Adults.

Description

Questionnaire assesses a person's leadership in many situations (job, volunteer, parent). Leadership behavior is measured on a three-dimensional grid: style (task or people orientation); style range (how many styles a person uses); and style adaptability (appropriate use of leadership style taking into account maturity of subordinates).

Feedback

Three-dimensional grid.

Follow up

Not reported with review materials.

Theory and Rationale

Not reported with review materials.

Administration

Self-administered.

Statistical Validation

Not reported with review materials.

Uses

Professional development planning.

Cost

Contact publisher.

The Leadership and Management of Schools

Blanchard Training and Development
125 State Place
Escondido, CA 92029
Phone: 800-728-6000
FAX: 619-489-8407
www.blanchardtraining.com

Purpose

The purpose of this survey is to describe the leadership and management practices of school administrators.

Target Group

School administrators.

Description

The LMS is a 50-item instrument measuring leadership on six scales include: good professional practice; decision making; providing individual support; providing intellectual stimulation; holding high performance expectations; development of vision and goals.

Feedback

Not provided with review materials.

Follow up

Not provided with review materials.

Theory and Rationale

Not provided with review materials.

Administration

Self-administered; hand-scored.

Statistical Validation

High construct validity (.978)

Uses

Evaluation and assessment for improvement.

Cost

Not provided with review materials.

Leadership Assessment Instrument

Educational Testing Service
Bennis, W. (Author)
Rosedale and Carter Roads
Princeton, NJ 08541
Phone: 609-734-5689

Purpose

Assesses personal competencies or characteristics essential to leadership.

Target Group

Adults.

Description

The LAI is a 75-item inventory in which each item is answered on a 5-point Likert scale. The LAI addresses both the personal competencies or characteristics essential to leadership and the skills to which leaders apply these competencies. LAI is also behavioral in that it focuses on specific, detailed behaviors.

Feedback

Narrative.

Follow up

Answer folders and development plan.

Theory and Rationale

Based on Bennis's definition of leadership.

Administration

Self assessment.

Statistical Validation

Not reported with review materials.

Uses

Personal growth and development planning.

Cost

Not available; Contact publisher.

Leader Behavior Analysis II (LBA-II)

Blanchard Training and Development
125 State Place
Escondido, CA 92029
Phone: 800-728-6000
FAX: 619-489-8407
www.blanchardtraining.com

Purpose

The LBA-II is designed to give leaders a better understanding of their leadership style by contrasting self-perceptions and other's perceptions (boss, associates, team members).

Target Group

Leaders and managers in all types of organizations.

Description

The LBA-II consists of twenty hypothetical leadership situations to which participants are asked to choose the appropriate strategy from the four options listed. Forms are provided for the leader and other familiar with his or her work.

Feedback

The feedback provides numeric and graphic data showing how the leader and others rated the frequency with which each of the four LBA-II styles is used. "Effectiveness scores" (based on the appropriateness of each response to the hypothetical situations) are also computed. The feedback profile is organized around four questions: Do I see myself as others see me? Am I flexible? Do I manage people differently? Do I diagnose well?

Follow up

The publishers offer a variety of books, articles, visual materials, and training programs centered on the concept on the concept of situational leadership. Training for trainers is also available.

Theory and Rationale

The LBA-II is based on the Hersey and Blanchard theory of situational leadership, which assumes that the "right" leadership behavior depends on matching the appropriate style with the needs of employees.

Administration

The LBA-II is administered onsite. It can be self-scored or can be computer-scored by the publisher with more feedback. (Onsite licenses are available for computer scoring.)

Statistical Validation

Not provided with review materials.

Uses

Most appropriate for professional development.

Cost

The LBA-II costs $8.95 per package including the assessment from and scoring materials.

Leadership Behavior Questionnaire

HRDQ
2002 Renaissance Boulevard #100
King of Prussia, PA 19406-2756
Phone: 800-633-4533
FAX: 800-633-3683
www.hrdq.com
Contact: Laurie Ribble Libove (LRLIBOVE@HRDQ.com

Purpose

A measure of "organizational leadership"

Target Group

Managers and employees.

Description

A 50-item instrument for individuals in organizations to use for self-assessment and development of management. Each item is a statement that describes a certain leadership behavior, characteristic, or effect that a leader might have one the organization.

There are 10 scale scores of 5 items each: five scales for Visionary Leadership Behavior, three scales for Visionary Leadership Characteristics, and two scales for Visionary Culture Building.

Feedback

Insufficient

Follow up

None provided

Theory and Rationale

Well-grounded in theory on transformational leadership.

Administration

Self-administered and self-scored.

Statistical Validation

High reliability; low validity

Uses

Leadership development.

Cost

$7.95 per self questionnaire; $2.95 per other questionnaire; $24.95 per trainer's guide.

Leadership Behavior Questionnaire

Organizational Design and Development

Purpose

Measures visionary leadership in organizations.

Target Group

Chief executives.

Description

The LBQ consists of 50 items (five items for each of ten scales): Focused Leadership, Communication, Trust, Respect, Risk, Bottom-Line, Empowerment, Culture, Long-Term Leadership, Organizational Leadership,

Feedback

Not included in review materials.

Follow up

Not included in review materials.

Theory and Rationale

The LBQ is based on the work of Bennis (1984) on the characteristics of exceptionally effective chief executives, across a wide range of organizational settings.

Administration

Self-administered.

Statistical Validation

Not reported.

Uses

Leader identification and professional development.

Cost

Not provided.

Leadership Dimensions Survey

Research Training and Development

Purpose

The LDS is designed to assess the leadership skills.

Target Group

Aspiring, potential, and present leaders.

Description

The LDS assesses leadership skills on four dimensions. It consists of 32 items, a scoring sheet and an interpretation sheet that covers results on each of the four dimensions. The four dimensions are: profound knowledge, profound strategy, purposeful direction, and purposeful behaviors. The survey is to be completed by five of the leader's peers, supervisors, or subordinates. Each question presents a statement about the leaders. Respondents are asked to mark on a four-point Likert scale their agreement.

Feedback

Not provided in review materials.

Follow up

Not available.

Theory and Rationale

Not provided.

Administration

Self-administering and self-reporting.

Statistical Validation

No validity or reliability data are available.

Uses

Identification and professional development.

Cost

Not available.

Leadership Effectiveness Analysis

Management Research Group
14-26 New York Street, Suite 301
Portland, ME 04101
Phone: 207-775-2173
FAX: 207-775-6796

Purpose

The LEA is designed to provide information to a manager/leader on how self-perceptions of his/her management practices, perspectives, and behavior compare with those of significant stakeholders and the expectations of the organization.

Target Group

Managers and technical professionals at all levels within an organization. A ninth grade reading level is required.

Description

The LEA Self Diagnostic Questionnaire consists of 84 questions and 18 demographic questions included for research purposes. The LEA observer Questionnaire has 66 items, 11 demographic questions, and 20 "for research only" questions that relate to the effectiveness of the person being rated.

The LEA provides feedback on 22 sets of leadership behavior grouped into 6 functional areas: Creating Vision; Developing Followership; Implementing Vision; Following Through; Achieving Results; and, Teamplaying.

Feedback

Strategies: comparison to norm; highlighting largest self/rater discrepancies; highlighting high/low items and scales; importance to job or success;

Follow up

Trainers' guide/manual; workshop; supplemental norms; video; supplemental materials from vendor.

Theory and Rationale

The LEA is based on the assumption that role incumbents will behave differently depending upon the situation or challenge. Situational challenges include: level of the role within the organization; the function within which the role is place; the philosophy or climate of the organization; specific stakeholder characteristics; and, the nature of the task.

Administration

Self-administered and can be completed in about 25 minutes. Computer-scored by vendor. On-line questionnaires currently being developed.

Statistical Validation

Internal consistency measure not appropriate. Interrater reliability moderate.

Uses

Modifications of behavior to better meet higher levels of effectiveness as perceived by stakeholders.

Cost

LEA questionnaires and computer-scoring are included in the price of the feedback product, rather than sold independently.

Retail Prices:

Leadership 360 (self and observers)	$300 per person
Leadership 360 (self data only)	$170 per person
Coaching for Results	$100 per person
Strategic Directions	$250 per person
Strategic Leadership Practices (single module)	$105 per person
Strategic Leadership Pr (all 6 modules)	$375 per person

Leadership Practices Inventory

Josey-Bass/ Pfeifer
350 Sansome Street
5th Floor
San Francisco, CA 94104
Phone: 800-274-4434
FAX: 800-569-0443
www.jbp.com

Purpose

"As you set out to train others, we ask that you share in our purpose—to help liberate the leader in everyone."

Target Group

Leaders at all levels in all organizations.

Description

The LPI consists of thirty items focused on five key leadership practices: challenging the process, inspiring a shared vision, enabling others to act, modeling the way, and encouraging the heart. Items use a ten-point Likert scale ranging from 1 (almost never) to 10 (almost always). A self-report and an observer rating can be used by supervisors, subordinates, peers, or others.

Feedback

The feedback provides overall ratings for the five dimensions of leadership, as well as a breakdown of individual items. Participants are presented with side-by-side comparisons of how their self-ratings compare with those of superiors, subordinates, and coworkers. The feedback includes percentile rankings using a norm group consisting of all leaders and observers who have taken the LPI since 1988. Participants are also given a rank-order listing of all items.

Theory and Rationale

The LPI is based on extensive research by James Kouzes and Barry Posner that focused on how "ordinary people accomplish extraordinary things." Leaders were asked to describe a "personal best" leadership experience. Their responses showed a consistent pattern that the researchers encapsulated in the five practices that are at the heart of the LPI.

Administration

Self-administered. The publishers advise that participants solicit the involvement of supervisors, subordinates, and peers who will be completing the observer form. Scoring can be done on-site by a facilitator, using the scoring software provided by the publishers.

Statistical Validation

The publishers report high reliability for the LPI, as well as excellent face validity. In addition, factor analysis studies show that that the five practices are separate entities. A variety of studies have linked LPI performance with various measures of on-the-job success (examples in facilitator's handbook).

Follow up

The publishers provide a facilitator's guide that outlines a follow up meeting to explain the results and begin the development process. Participants are given a handbook that interprets the scores and recommends activities for professional development. Under the headings "learning by doing," "learning from others," and "learning in the classroom or on your own," the workbook offers professional development suggestions for each of the five practices.

Uses

The instrument is intended and most appropriate for professional development activities.

Cost

The LPI-Individual Contributor (LPI-IC) Facilitators Guide includes one copy each of the self and observer instruments and scoring software. Quantity discounts are available.

LPI-IC facilitators guide - $49.95
LPI-IC: Self - $12.95
LPI-IC: Observer - $3.95

Leadership Qualities Scale

Talico, Inc.
2320 S. Third Street
Jacksonville Beach, FL 32250

Purpose

Allows managers and supervisors to compare their personal leadership behavior, practices, and skills with those characteristics of superior managers.

Target Group

Managers and supervisors.

Description

The LQS, formerly Five Star Leadership Skills Inventory, consists of 28 items with a Likert type response scale. The items measure respondents' perceptions about their leadership behaviors which include pride and confidence, work ethic, work standards, teamwork, values, and creativity.

Feedback

Not available.

Follow up

Not available.

Theory and Rationale

Not available.

Administration

Respondent booklets and administration guide.

Statistical Validation

Not reported.

Uses

Developmental purposes only.

Cost

Not reported.

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Leadership Report

Manus Associates
100 Prospect Street
South Tower
Stamford, CT 06901
Phone: 800-445-0942
FAX: 336-288-3999
Email: manus1@aol.com
www.rightmanus.com
Contact: Debbie Horne

Purpose

Assesses power of leaders and how it is used to empower followers.

Target Group

Leaders and managers.

Description

The LR is based on the notion that the way power is used to empower followers is the key factor that distinguishes transformational for transactional leaders. The LR is an 18-item forced-choice questionnaire. Each item consists of a stem followed by two alternative choices. The respondent allocates five points between the two alternatives, in any combination he/she desires. One choice is designed to represent how a typical transactional leaders would think or act, the other being characteristic of transformational leaders. While some items are behaviorally oriented, most are intended to tap the attitudes and values characteristic of transformational and transactional leaders.

Dimensions include: creating versus conserving; arousing versus clarifying or empowering through excitement; active versus reactive

Feedback

Not provided with review materials.

Follow up

Not provided with review materials.

Theory and Rationale

Not provided with review materials.

Administration

Not provided with review materials.

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Statistical Validation

Not provided with review materials.

Uses

Not provided with review materials.

Cost

Not provided with review materials.

Leadership Skills Assessment

Acumen
4000 Civic Center Drive
5th Floor
San Rafael, CA 94903
Phone: 800-544-8626
FAX: 425-479-5358
Email: acumen@acumen.com
www.acumen.com
Contact: Jeannie Elrod

Purpose

Leadership Skills seeks to stimulate leadership development by informing leaders of their skills in major leadership domains.

Target Group

Leaders of organizations in a wide range of industries, including education.

Description

Leadership Skills is a multi-rater instrument that provides feedback on sixteen leadership skills in four domains: task management (informing, efficiency, planning, and problem-solving); team development (performance, feedback, relationship skills, staff development, and team motivation); business values (quality improvement, customer focus, and promoting innovation): and leadership (accountability, empowerment, influence, mission skills, and networking). The instrument contains 96 items using a 5-point Likert scale ranging from 1 ("never") to 5 ("always").

Feedback

Participants receive graphic and narrative feedback, including summary results and item-by-item breakouts comparing self-scores and ratings by others. Detailed interpretive information is provided.

Follow up

The feedback report includes many activities and ideas for using the results for professional development.

Theory and Rationale

Not provided in review materials.

Administration

Can be self-administered. Scoring provided by publisher.

Statistical Validation

Not provided with review materials.

Uses

The most appropriate use is for professional development.

Cost

Cost varies from $145 to $185 depending on quantity, processing, and the method selected to capture data.

Leadership Sphere Inventory

ETS – Developmental Dynamics
P.O. Box 26026
Austin, TX 78755
Phone: 512-450-1854
FAX: 512-450-1854
Email: Awmsmith@aol.com

Purpose

The LSI is designed to help leaders understand how they view their roles and priorities as leaders.

Target Group

Anyone in a leadership role—executives, administrators, commanders, managers, and supervisors.

Description

The LSI is a self-assessment instrument that seeks to measure how leaders balance the different elements of leadership style. It consists of 24 items that ask participants to rank order a set of behaviors and beliefs from 1 ("least indicative") to 5 ("most indicative"). In each case, participants are asked to rank the items based on present behavior and potential (ideal) behavior. The questions yield data on the relative strengths of four major styles: interveners, implementers, improvers, and innovators. There is also an "integrated" style with various combinations of the first four. Discrepancies between present behavior and ideal behavior indicate developmental needs.

Feedback

The LSI provides directions for participants to self-score their responses. Numerical and graphic feedback is provided, though the review materials included little narrative explanation.

Follow up

The test is structured to provide direction for developmental activity, but the review materials did not include extensive development activities. A separate manual provides more detailed interpretation and applications.

Theory and Rationale

The LSI is based on research and field studies focused on the way that individuals view their relative roles and priorities as leaders.

Administration

The LSI is self-administered and self-scored.

Statistical Validation

Not provided with review materials.

Uses

The LSI is designed for self-evaluation and professional development; it "should not be used to assign or change one's work position or status or to evaluate one's work performance."

Cost

Several options of instruments and packages are available to individualize the LSI for each organization.

Leadership Skills Inventory

Acumen
4000 Civic Center Drive
5th Floor
San Rafael, CA 94903
Phone: 800-544-8626
FAX: 415-479-5358
Email: acumen@acumen.com
www.acumen.com
Contact: Jeannie Elrod

Purpose

Helps individuals develop the ability to handle the "people" side of enterprise.

Target Group

Adults.

Description

The LSI begins with a section that asks the individual to express agreement or disagreement on 12 principles that form the basis of Anderson's theory of transforming leadership. A self-scoring guide allows the person to assess if he or she is moving in the general direction of Anderson's approach to leadership.

The inventory consists of sets of 8 to 12 rating scales subsumed under the general headings of Self-Management; Interpersonal Communication; Counseling and Problem Management; Consulting; and, Role, Style, and Skill Shifting.

Feedback

Graphs

Follow up

No manual provided.

Theory and Rationale

Based on transformational leadership theory (Anderson, 1992; Kouzes & Posner, 1987).

Administration

Self assessment. 40-50 minutes

Statistical Validation

No norms or evidence of reliability or validity.

Uses

For top-level executive teams interested in leadership development.

Cost

$12 per test booklet

Leadership Strategies Inventory

Organizational Design and Development, Inc.,

Purpose

To help respondents gain some useful information about their leadership behavior.

Target Group

Leaders and managers.

Description

The LSI provides an opportunity to examine the impact of that behavior on others as well as on the organization as a whole. The tool measures four different leadership strategies: Strong Man, the Transactor, the Visionary Hero, and the Superleader.

Three of these styles are oriented to the past or present time, while the fourth style look to the future.

Feedback

Not provided.

Follow up

None provided.

Theory and Rationale

Not included in review materials.

Administration

Self-administer

Statistical Validation

Not reported.

Uses

Not reported.

Cost

Not available

Leadership Trait Questionnaire

Human Synergistics International
39819 Plymouth Road
Plymouth, MI 48170
Phone: 734-459-1030
FAX: 734-459-5557
www.humansyn.com

Purpose

Provides information on how you see yourself and how others see you as a leader.

Target Group

Adults.

Description

Provides information about how you see yourself and how others see you as a leader. The leadership trait

Feedback

A chart is provided which allows you to see where your perceptions are the same as others and where they differ.

Follow up

None reported in review materials.

Theory and Rationale

The LTQ has roots in leadership theory that suggested that certain people were born with special traits that made the "great" leaders. Bass, Bennis, Stodgill

Administration

360-degree; self-administered and self-scored.

Statistical Validation

None reported with review materials.

Uses

Professional development planning.

Cost

Not available. Contact publisher.

Least Preferred Co-Worker Measure

Acumen
4000 Civic Center Drive
5th Floor
San Rafael, CA 94903
Phone: 800-544-8626
FAX: 425-479-5358
Email: acumen@acumen.com
www.acumen.com
Contact: Jeannie Elrod

Purpose

Measures a person's leadership style.

Target Group

Adults.

Description

Measures your style by having you describe a co-worker with who you had difficulty completing a job. The LPC instrument asks you to describe your co-worker on 18 sets of adjectives with a rating scale 1-8.

Feedback

Task or Relationship motivated behavior scores.

Follow up

Not available.

Theory and Rationale

Contingency theory related—measuring leader-member relations, task structure, and position power.

Administration

Self-administered and self-scored.

Statistical Validation

None reported with review materials.

Uses

Leadership development.

Cost

Not available. Contact publisher.

Leader-Member Exchange 7

Pfeiffer& Company International Publishers, Inc.
8517 Production Avenue
San Diego, CA 92121-2280

Purpose

Measures respect, trust, and obligation.

Target Group

Adults.

Description

A 7-item questionnaire that measures the quality of the working relationship between leaders and followers. The LMX 7 measures three dimensions of leader-member relationships: respect, trust, and obligation.

Feedback

Scores obtained on the LMX 7 can be interpreted as very high, high, moderate, low, or very low. Scores in the upper range are indicative of stronger, higher-quality leader-member exchanges (e.g., in-group members), whereas scores in the lower ranges are indicative of exchange of lesser quality (e.g., out-group members).

Follow up

Not reported in review materials.

Theory and Rationale

Graen & Uhl-Bien, 1995

Administration

Self-administered; self-scoring.

Statistical Validation

A reliable and valid measure of the quality of leader-member exchange theory.

Uses

Fosters strong partnerships.

Cost

Not available. Contact publisher.

Leatherman Leadership Questionnaire

International Training Consultants, Inc.
151 Park Avenue
League City, TX 77573
Phone: (281) 557-9372
(800) 998-8764
FAX: (281) 557-9223
Email: itc@trainingitc.com
www.trainingitc.com
Contact: Harry A. Marxen

Purpose

To aid in selecting leaders, providing specific feedback to participants on their leadership knowledge for career counseling, conducting accurate needs analysis, and screening for assessment centers or giving pre/post assessment feedback.

Target Group

Managers, supervisors, team leaders, and potential leaders.

Description

339 items (2 parts) Assigning work, Conducting meetings, Career counseling, Giving positive feedback, Coaching, Negotiating, Oral communication, Performance appraisal, Managing change, Performance standards, Employee complaints, Persuasion, Employee conflicts, Making presentations, Performance counseling, Problem solving, Making decisions, Selection interviews, Delegating, Team building, Discipline, Termination interviews, Handling emotional situations, Goal setting, Time Management, Handling grievances, One-on-one Training

Feedback

Reports provided for both the organization and the individual examinees. The organizational report lists each task and the scores of the group on that task. This provides a handy tool for identifying staff strengths and remediation needs. The individual reports provide task and total scores for the individual, the group taking the test, and everyone who has taken the test to date (currently 23,000 individuals). Task and total percentile scores are also computed for individual and group, based on this normative group.

Accompanying the individual results is a glossy 12-page booklet which provides an explanation and answers numerous questions. The booklet provides realistic answers to typical real-life questions.

Follow up

Development manual/guide (350 page) provided. Excellent for staff improvement.

Theory and Rationale

Knowledge-based.

Administration

Group; 300-325 minutes for battery; 150-165 minutes per part.

Statistical Validation

High reliability and validity.

Uses

Professional development

Cost

$95/$75 person; initial $1500 set-up cost; Includes a post-test development guide for professional growth activities. Cost breaks for quantity;

Life Styles Inventory

Human Synergistics International
39819 Plymouth Road
Plymouth, MI 48170
Phone: 734-459-1030
FAX: 734-459-5557
www.humansyn.com

Purpose

The LSI is designed to increase productivity and develop leadership by helping participants understand their style of thinking, behaving, and interacting.

Target Group

Leaders in all types of organizations.

Description

The LSI is a 360-degree feedback instrument that assesses twelve basic thinking patterns, or styles: humanistic-encouraging, affiliative, approval, conventional, dependent, avoidance, oppositional, power, competitive, perfectionistic, achievement, and self-actualizing. These are further grouped into categories of "constructive," "passive/defensive," or "aggressive/defensive." The inventory contains 240 items in the form of words or short phrases; participants are asked to respond with a "2" if the word is "like you most of the time," "1" if the word is "like you quite often," or "0" if the word is "essentially unlike you."

The "LSI 1" is the self-assessment form; the "LSI 2" is aimed at eliciting feedback from others.

Feedback

Participants receive self-assessment information in the form of a graphic "circumplex" that charts the relative strengths of each of the twelve styles. In each case, scores are characterized as "high," "medium," or "low," based on a norm group of 9,207 individuals. The LSI 2 adds a similar plotting for responses of others, and also adds fourteen "summary perceptions" showing how others view the person being assessed. Detailed interpretations are provided in self-development guides for both LSI 1 and LSI 2.

Follow up

The publisher provides self-development guides for both versions that contain extensive development activities, including "thought starters" and "change suggestions" for each style.

Theory and Rationale

The LSI is based on the assumption that behavior is caused by thoughts and self-concept, and therefore it can only be understood by knowing those thoughts.

Administration

Self-administered and self-scored. The LSI 1 takes 20-30 minutes to complete and 10-15 minutes to score; the LSI 2 requires 20-30 minutes to administer and 45-60 minutes to score.

Statistical Validation

Not provided with review materials. A bibliography cites a number of published research studies probing the reliability and validity of the LSI.

Uses

The LSI is most appropriate for professional development.

Cost

The LSI 1 kit, which includes self-inventory, development guide, and profile summary cards, is $29. The LSI 2 kit, which includes five "description by others" inventories, a development guide, scorer's worksheet and instructions, and profile supplement, costs $51. The combined kit for the LSI 1 and LSI 2 is $70.

Management Behavior Assessment Test

Talico, Inc.
2320 S. Third Street
Jacksonville Beach, FL 32250

Purpose

The MBAT evaluates the behavior of first-level managers, supervisors, team leaders and/or candidates for those positions.

Target Group

First-level managers, supervisors, team leaders.

Description

The content of the test is based on identifying those skills, practices and behaviors used by successful, effective managers, supervisors and team leaders, in dimensions such as: change and improvement, communication, human relations, leadership, motivation, performance management, planning and organizing, quality, teamwork, vision, mission, and goals.

Feedback

Interpretation guide.

Follow up

Not reported with review materials.

Theory and Rationale

Not available.

Administration

Self-administered; self-reporting.

Statistical Validation

Not available.

Uses

Professional development.

Cost

Not available; Contact publisher.

Management Practices Inventory

Talico, Inc.
4375-4 Southside Boulevard, Suite 157
Jacksonville Beach, FL 32216
Phone: 904-642-0300
FAX: 904-642-7004

Purpose

To assess practices, skills, and behaviors of managers.

Target Group

Managers and other leaders at all organizational levels.

Description

The MPI is a complete assessment and feedback system that has been specially designed to evaluate the behaviors and skills your key employees need to lead the work force of the 21st century. This 48-item assessment instrument assesses 12 modern leadership behavior and skills dimensions.

Key behavior and skill areas measured by the MPI include: Leading and Influencing; Facilitating Teams; Managing Diversity; Managing Change; Envisioning; Coaching and Mentoring; Coordinating Activities; Managing Projects; Communicating; Ethical Behavior; Continuous Improvement; Solving Problems. Scales include: planning, organizing, directing, controlling.

Feedback

Provides constructive performance development feedback to executives, managers, supervisors and other leaders and it also provides them with the information they need to construct a results-producing personal development plan.

Follow up

None reported.

Theory and Rationale

Not provided with review materials.

Administration

The MPI requires only 20 minutes to complete and is easy to administer, score, and interpret.

Statistical Validation

Not reported with review materials.

Uses

Excellent for training needs analysis, performance coaching, career counseling and development and for improving performance related communication among all levels of employees.

Cost

Set of 20 booklets for $89.95
Administrator's manual $19.95

Management Practices Survey

Personnel Decisions International
2000 Plaza VII Tower
45 South Seventh Street
Minneapolis, MN 55402-1608

Purpose

Assessment of behaviors for managerial success.

Target Group

Adults.

Description

Based on identified categories of behavior that are important for interactions with peers, superiors, and outsiders in addition to subordinates. Taxonomy of eleven categories: informing, consulting and delegating, planning and organizing, problem solving, clarifying roles and objectives, monitoring operations and environment, motivating, recognizing and rewarding, supporting and mentoring, managing conflict and team building, and networking.

Feedback

Not reported with review materials.

Follow up

Not reported with review materials.

Theory and Rationale

Yukl—Derived from a variety of research methods, including diaries, critical incidents, interviews, and questionnaires.

Administration

Self-administered.

Statistical Validation

Not reported with review materials.

Uses

Not reported with review materials.

Cost

Not reported with review materials.

Manager View - 360

Organizational Performance Dimensions
137 Strand Street
Santa Monica, CA 90405
Phone: 800-538-7628
http://www.opd.net

Purpose

Manager View 360 provides a multi-rater feedback on 20 critical managerial competencies.

Target Group

The instrument is designed to be administered to supervisors, managers, and executive leaders.

Description

Manager View-360 contains 100 items and provides feedback on 20 scales. Each scale contains 5 items. The scales are grouped into: Communication Skills, Task Management Skills, Interpersonal Skills, Problem-Solving Skills.

Feedback

Comparison to norms; Highlighting largest self/rater discrepancies; Item-level feedback; Highlighting high/low items and scales. Scoring software allows to print questionnaires, record data, calculate results, and print text reports and graphs in-house.

Follow up

Support for Participant: Development and planning guide; workshop; post-assessment; vendor hotline; summary worksheets.

Support for Trainer: Trainers' guide/manual; workshop; supplemental norms; supplemental materials from the vendor.

Theory and Rationale

MV-360 was developed in early 1985 and was originally titled Management Practices Questionnaire. It was based on a job analysis of supervisor and managerial positions in several large service, manufacturing and aerospace companies. Using the results of the job analysis, items were rationally constructed to measure the full range of supervisory and managerial skills.

Administration

Vendor scoring; scoring software. Assessment can be completed in approximately 20 – 30 minutes.

Statistical Validation

Test-retest reliability = .65
Internal Consistency reliability = .71 - .91
Validity- high

Uses

Leadership development

Cost

Initial purchase of the MV-360 base software system and administration manual is $299; $85 per participant.

Matrix: The Influence Behavior Questionnaire

Manus Associates
100 Prospect Street
South Tower
Stamford, CT 06901
Phone: 800-445-0942
FAX: 336-288-3999
Email: manus1@aol.com
www.rightmanus.com
Contact: Debbie Horne

Purpose

MATRIX integrates feedback on power and influence for a complete picture of people's current behavior and potential.

Target Group

MATRIX was designed for people at all levels, including top management and professional individual contributors.

Description

MATRIX consists of 35 behavioral items, 10 power items, 8 recommendation items, and 9 demographic items. Feedback scales include: role power, expertise power, relationship power, reasoning, inspiring, consulting, recognizing, exchanging, coalition building, establishing authority, and pressuring.

Respondents rate how frequently the individual uses each behavior on a 5-point Likert scale (5=often; 1=never).

Feedback

Bar graph and frequency distribution.

Comparison to norms; Highlighting largest self/rater discrepancies; Item-level feedback; Highlighting high/low items and scales; "do more/do less"

Follow up

Development and planning guide; workshop; post-assessment; vendor hotline; summary worksheets; video for trainer.

Theory and Rationale

MATRIX was developed to measure influence behavior that are relevant for managerial effectiveness (Yukl, Lepsinger, & Lucia, 1992). In developing the items for the instrument, the authors focused on proactive behaviors that are used to influence compliance with requests and commitment to plans.

Administration

The instrument can be completed in 15-20 minutes. Users must go through a certification process that includes participating in a MATRIX workshop, attending a train-the-trainer session, and being observed delivering a session.

MATRIX is computer-scored by the vendor. Turnaround time is 2 weeks.

Statistical Validation

High reliability (test-retest; internal consistency)

Significant correlations—high validity

Uses

Professional development and growth.

Cost

MATRIX is sold in sets. Cost varies by number ordered per year.

1-99	$350 per set
100-249	$325 per set
250+	$285 per set

Management Effectiveness Profile System

Human Synergistics International
39819 Plymouth Road
Plymouth, MI 48170
Phone: 734-459-1030
FAX: 734-459-5557
www.humansyn.com

Purpose

Developed to assess managers' on-the-job skills and behaviors as seen by the managers themselves and by other people.

Target Group

Middle- to upper-level managers and has been used in industrial, service, and public-sector organizations.

Description

A 98-item questionnaire. Respondents rate each item on a 7-point Likert scale. Scales include: problem solving; time management; planning; goal setting; performance; organizing; team development; delegating; participating; integrating differences; providing feedback; stress management.

Feedback

The fourteen scales represent 3 feedback areas: Task Skills, Interpersonal, and Personal Skills.

Follow up

Transparencies available ($100) to assist in debriefing.

Theory and Rationale

Derived from interview with managers in which they were to describe ways that otherwise effective people failed as managers.

Task Skills and Interpersonal Skills based on Stogdill's (1963) conception of initiating structure and consideration.

Administration

360-degree tool. 35 minutes. Vendor-scored.

Statistical Validation

Low construct validity (.05); Internal Consistency reliability (.91-.85).

Uses

Leadership development.

Cost

$125 per participant. MEPS leader guide is available for $125.

Meyer Kendall Assessment Survey

Western Psychologist Services, Inc.
12031 Wilshire Boulevard
Los Angeles, CA 90025-1251
Phone: 310-478-2061

Purpose

Measures personal attributes important to managerial and business success.

Target Group

Adults.

Description

A multifaceted instrument designed to measure a number of personal attributes that have been show to be important to managerial and business success. It yields scores on 12 scales that measure attributes relevant to job performance.

The MKAS is designed to be used with other formal evaluation procedures to provide a comprehensive picture of an individual's work-related personality style. Subtests include: objectivity, social desirability bias, dominance, extraversion, people concerns, attention to detail, anxiety, stability, psychosomatic tendencies, determination, achievement motivation, independence.

Feedback

Not available.

Follow up

Not included in review materials.

Theory and Rationale

Not included in review materials.

Administration

Self-administered; self-scored.

Statistical Validation

Not included.

Uses

The MKAS can be helpful in making hiring and promotion decisions. Helpful in organizing productive work teams.

Cost

Contact publisher.

Multi-Factor Leadership Questionnaire

Personnel Decisions International
2000 Plaza VII Tower
45 South Seventh Street
Minneapolis, MN 55402-1608

Purpose

Designed to access the full range of leadership styles.

Target Group

Management personnel.

Description

There are two versions (the *leader* version and the *rater* version) of the MLQ, each consisting of 45 statements. Both forms use a 5-point Likert scale representing the relative frequency of each behavior.

The MLQ measures four broad characteristics of leadership behavior, each of which consists of several smaller facets. Scores include: Idealized Influence, Inspirational Motivation, Intellectual Stimulation, Individualized Consideration, Contingent Reward, Management by Exception, Laissez-Faire, Extra Effort, Effectiveness, Satisfaction.

Feedback

Computer-generated commentary of the results.

Follow up

None reported.

Theory and Rationale

Burns (1978) and Bass (1985)

Administration

Administration time not reported. Machine scoring.

Statistical Validation

Not available.

Uses

Determines the degree to which the leader is seen as being effective and creating satisfaction among followers.

Cost

$25 per Sampler set including manual and one each of the components used to administer, score, and interpret the MLQ; $100 per Permission set including Sampler set along with an agreement to reproduce up to 200 copies of the instrument for personal and non-commercial use for one year.

Myers-Briggs Type Indicator

Consulting Psychologists Press
3803 E. Bayshore Road
Palo Alto, CA 94303
Phone: 800-624-1765
FAX: 650-969-8606
www.cpp~db.com

Purpose

The MBTI is designed for use in a wide variety of settings, including business, counseling, and education, for personal and organizational development, team building, counseling, identification of learning styles, and many other activities.

Target Group

Anyone from age 14 to adult.

Description

The MBTI is not specifically a leadership assessment, but it assesses personal traits that affect the ways leaders interact with others and carry out their jobs. Form G (self-scorable) contains ninety-four items that determine preferences in four areas: extraversion-introversion, sensing-intuition, thinking, feeling, judging-perceiving. These four areas are further combined into sixteen personality "types." Inventory items are forced-choice, asking participants to choose between preferred behaviors or appealing words.

Feedback

Form G provides brief explanations of the four major areas as well as the sixteen personality types. The publishers provide a variety of more detailed narrative reports as well as advanced versions of the instrument that provide expanded interpretations.

Follow up

The publishers offer a number of books and video materials that explore the implications and applications of the MBTI.

Theory and Rationale

The MBTI is based on the personality theory of Carl Jung, who believe that human beings could be categorized into several psychological types, each of which was characterized by certain patterns of thinking and behavior. Through repeated empirical assessments, the MBTI has refined these types into ther current configuration.

Administration

Form G can be self-administered and scored. However, users must meet certain qualifications to license the materials, including a degree from an accredited college or university and successful completion of a course in the interpretation of psychological tests and measurement at an accredited college or university.

Statistical Validation

Information on validity and reliability is available in the publisher's manual on the MBTI (not reviewed).

Uses

As noted, the MBTI has many uses. School leaders may find it most useful in understanding how their actions and relationships are affected by their preferred style.

Cost

Form G for the MBTI is available for $37.50 for a package of ten. $75 for online, scored versions.

National Association Secondary School Principals Assessment Centers

National Association of Secondary School Principals
Office of Professional Development and Assessment
1904 Association Drive
Reston, VA 20191
Phone: 703-860-0200
FAX: 703-476-5432
www.nassp.org

Purpose

The NASSP assessment centers are designed to help school districts identify and develop leadership talent.

Target Group

School leaders or potential school leaders.

Description

The NASSP assessment process uses a variety of simulated leadership tasks to assess the skills of those serving as school leaders or aspiring to school leadership positions. Tasks include group discussions, role plays, in-basket problems, oral presentations, and written papers, with evaluation being done by specially trained observers. Key skills include educational leadership (setting instructional direction, teamwork, and sensitivity); resolving complex problems (judgment, results orientation, and organizational ability); communication skills (oral and written); and developing self and others.

The assessment is usually administered in a day-long session at one of over forty assessment centers around the country, followed in several weeks by a feedback session.

In addition to this assessment process: LEAP: Leadership Early Assessment Program; SLDP: Superintendent Leadership Development Program.

Feedback

Participants receive written and oral feedback including development options several weeks following the assessment.

Follow up

The feedback session includes discussion of development plans. NASSP offers fourteen or fifteen development programs appropriate for following results of the assessment.

Theory and Rationale

The main assessment process is newly revised, based on research by the Interstate School Leaders Licensure Consortium (ISLLC), National Policy Board for Educational Administration (NPBEA), and the NASSP.

Administration

Assessments are conducted and followed up by trained assessors, typically at a regional assessment center.

Statistical Validation

Several validation studies have been conducted on the NASSP assessment center approach, and other are planned for the future.

Uses

Used for selection, promotional readiness, or professional development.

Cost

The cost varies among the regional assessment centers, each of which sets its own fee schedule.

NEO-Pi R

Psychological Assessment Resources, Inc.
P.O. Box 998
Odessa, Florida 33556
Phone: 1-800-331-TEST

Purpose

Measures personality traits.

Target Group

Adults.

Description

240-items on 5 point scale. Measures qualities of Neuroticism, Extraversion, Openness, Agreeableness, Conscientiousness. Based on self-reports.

Feedback

The set of scores an individual receives can be plotted on a profile form to see the overall configuration of his or her personality, relative to the appropriate normative group.

Follow up

Not included in review materials.

Theory and Rationale

Large research base on the Five Factor Model of Personality.

Administration

Individual administration or group administration. Hand-scored or machine-scored

Statistical Validation

Validated against other personality inventories. High construct validity. Internal Consistency. Cronbach's alpha (.86 - .92)

Uses

Personal development.

Cost

The cost of the kit is $190.00. The kit includes manual, 10 reusable Form S test booklets, 10 Form R test

Omnia Profile

Purpose

Identification of employees' "personality types."

Target Group

Adults.

Description

An in-depth, 360-degree analysis of a division or department, based on the manager's self-assessment and the associates' anonymous assessment of him/her, the workplace and themselves.

Feedback

Provides feedback on: good professional practices; decision making; providing individual support; providing intellectual stimulation; holding high performance expectations; development of vision and goals.

Follow up

Report available form publisher as part of administration and scoring procedures.

Theory and Rationale

Not available with review materials.

Administration

Self-report, not multiple-choice checklist of attributes in eight mutually exclusive categories. About 20 minutes for administration; very user-friendly. Scoring on-line.

Statistical Validation

No data available. Good face validity.

Uses

Assumes that knowledge of "type" can lead to distinct managerial strategies to increase morale, sense of belonging, etc.

Cost

$250 per person

Organizational Commitment Questionnaire

Educational Testing Service
Mowaday (Author)
Rosedale and Carter Roads
Princeton, NJ 08541
Phone: 609-734-5689

Purpose

Measures employee commitment.

Target Group

Adults.

Description

The OCQ is designed to measure employee commitment. Instrument consists of a series of statements that represent possible feelings that individuals might have about the company or organization for which they work. Based on a seven-point Likert rating scale, respondents are to indicate the degree of their agreement or disagreement with each statement.

Feedback

Not included in review materials.

Follow up

Not included in review materials.

Theory and Rationale

Organizational commitment is defined by the authors as the relative strength of an individual's identification with and involvement in a particular organization, characterized by three related factors. These factors include a strong belief in and acceptance of the organization's goals and values; a willingness to exert considerable effort on behalf of the organization; and a strong desire to maintain membership in the organization.

Administration

Self-administered and self-scored.

Statistical Validation

Not included in review materials.

Uses

Professional development.

Cost

Contact publisher

Path/Goal Leadership Questionnaire

Human Synergistics International
39819 Plymouth Road
Plymouth, MI 48170
Phone: 734-459-1030
FAX: 734-459-5557
www.humansyn.com

Purpose

Provides information about leadership style.

Target Group

Adults.

Description

The PGLQ is a 20-item questionnaire requiring individuals to respond using a 7-point scale (7=always; 1=never). The questionnaire provides information for respondents about four different leadership styles: directive, supportive, participative, and achievement oriented. The way respondents score on each of the different styles provides them with information on their strong and weak styles, as well as the relative importance they place on each of the styles.

Feedback

Emphasis on style.

Follow up

None reported in review materials.

Theory and Rationale

Indvik 1985, 1988—developed as a complex set of theoretical assumptions to direct researchers in developing new leadership. Explains how leaders motivate subordinates to be productive and satisfied with their work.

Administration

Self-administered; self-scored.

Statistical Validation

None provided.

Uses

Professional development and goal planning.

Cost

Contact publisher.

Personality Advantage Questionnaire

HRD Press
22 Amherst Road
Amherst, MA 01002

Purpose

A way for employees to learn about themselves and how others see them.

Target Group

Adults

Description

The PAQ is a way for employees to learn about themselves and to gain an understanding of the way others see them. The PAQ contains 100 adjectives and phrases commonly used to describe different aspects of behavior. It measures five dimensions of personality as they relate to the work environment: communication style, drive and determination, thinking style, emotions, relationship with others.

Feedback

Profile

Follow up

Not included in review materials.

Theory and Rationale

Not included in review materials.

Administration

Computer disk administration and reporting.

Statistical Validation

Not included with review materials.

Uses

Profile that is generated can be used as a training aid or exercise in career development, communication, team building, conflict or stress management, leadership, or negotiation or sales.

Cost

Contact publisher.

Personal Profile System

Inscape Publishing
3706 Old Capitol Trail
Wilmington Delaware 19808
Phone: 302-892-9095
FAX: 302-892-9096
http://respectinc.com

Purpose

Allows for understanding of self and others.

Target Group

Current and prospective leaders.

Description

The PPS build and maintains a sense of personal worth and self-esteem in one's personal and professional life. This communication system enables individuals to identify their work behavioral style, and creates the motivational environment most conducive to success. It increases a person's appreciation of different work styles and identifies and minimizes potential conflicts with others.

Feedback

Not available with review materials.

Follow up

Not available with review materials.

Theory and Rationale

Not available with review materials.

Administration

Self-administered and self-scoring.

Statistical Validation

Not available with review materials.

Uses

Personal development.

Cost

$19.95 each

Principal Instructional Management Rating Scale

Hallinger and Murphey

Purpose

Measures the instructional leader behavior of elementary and seconday school principals.

Target Group

Principals and potential school leaders

Description

71-item instrument measuring instructional leader behavior. Each item focuses on a specific job-related behavior. Subscales include: Communicating the school goals; supervising and evaluating instruction; coordinating the curriculum; monitoring student progress; protecting instructional time; maintaining high visibility; providing incentives for teacher; promoting professional development; developing and enforcing academic standards; providing incentives for learning; and, framing school goals.

Feedback

Not included with review materials.

Follow up

Not included with review materials.

Theory and Rationale

Hallinger (1983), Hallinger and Hausmam (1993)

Administration

Self-administered (20-30 minutes) and self-scored.

Statistical Validation

Content, discriminant, and construct validation of the instrument provided. The lowest alpha coefficient (reliability) for the 11 subscales was 0.75.

Uses

School evaluation, staff development, research, and district policy analysis. Evaluation of school's effectiveness.

Cost

$100 for master and permission to copy for one year.

Principal Leadership and Self Appraisal of Effectiveness

Educational Testing Service
Miserandino (Author)
Rosedale and Carter Roads
Princeton, NJ 08541
Phone: 609-734-5689

Purpose

To determine strengths and weaknesses of school principal leadership behaviors.

Target Group

School principals.

Description

A self-appraisal form for school principals to elicit an evaluation and understanding of the factors which impact upon their personal effectiveness as principals. Can help determine their strengths and weaknesses.

Feedback

Not included. Please consult ED 275027 (14 pages)

Follow up

Not included. Please consult ED 275027 (14 pages)

Theory and Rationale

Not included. Please consult ED 275027 (14 pages)

Administration

Not included. Please consult ED 275027 (14 pages)

Statistical Validation

Not included. Please consult ED 275027 (14 pages)

Uses

Not included. Please consult ED 275027 (14 pages)

Cost

Not included. Please consult ED 275027 (14 pages)

The Principal Perceiver

The Gallup Organization
P.O. Box 5700
Lincoln, NE 68505
Phone: 402-489-9000
FAX: 402-486-6317
www.gallup.com

Purpose

The Principal Perceiver is designed for the selection and development of school leaders.

Target Group

In-service principals or prospective principals.

Description

The Principal Perceiver consists of a structured interview conducted and scored by a trained facilitator/assessor. The instrument is designed to identify twelve key "themes" in the beliefs and behaviors of school leaders; commitment, ego drive, achiever, developer, individualized perception, relator, stimulator, team, arranger, command, discipline, and concept.

Feedback

Participants or users receive verbal and written feedback showing scores on each theme and overall score. Graphic feedback shows low and high areas. The scoring is based on "ideal answers" rather than empirical norm.

Follow up

None indicated in review materials, though publishers suggest that the results can be used to identify areas of strength and weakness.

Theory and Rationale

Perceiver interviews are based on the belief that people show spontaneous, recurring patterns of thought, feeling, and behavior that predict how they are likely to perform in a given situation. Through empirical research, the publishers have established correlations between key indicators and job performance.

Administration

The Principal Perceiver must be administered, scored, and interpreted by a trained and certified assessor. Districts may arrange to have staff members become certified, or the Gallup Organization will provide someone to conduct interviews and feedback by telephone.

Statistical Validation

Not provided with review materials.

Uses

Selection and/or development of K-12 school administrators.

Cost

$2,150 per person

Problem Solving Skills Questionnaire

Pfeiffer& Company International Publishers, Inc.
8517 Production Avenue
San Diego, CA 92121-2280

Purpose

Measures managers' and supervisors' perception of communication behaviors.

Target Group

Adults.

Description

Designed to help managers, supervisors and other key personnel measure their perception of communication behaviors that contribute to successful interpersonal transactions. This 20-item questionnaire provides feedback concerning an individual's ability to discriminate between interpersonal communication responses which facilitate the development of a problem-solving conversation and those which hinder the development of such a conversation. Positive and negative responses are required with this tool. Projections and interpretations can be made based on an analysis of scores.

Feedback

Not included in review materials.

Follow up

Not included in review materials.

Theory and Rationale

Not included in review materials.

Administration

Self-administered; self-scored.

Statistical Validation

Not included in review materials.

Uses

Professional development.

Cost

Contact publishers.

The Profilor

Personnel Decisions International
2000 Plaza VII Tower
45 South Seventh Street
Minneapolis, MN 55402-1608

Purpose

The Profilor was developed to provide managers with feedback on the skills they need to be effective in their present job and in future jobs. It focuses on specific job-related skills rather than on personality traits or managerial style.

Target Group

Mid-level managers.

Description

The standard version has 130 items that form the following 24 scales: analyze, use sound judgment, establish plans, manage execution, provide direction, lead courageously, influence others, foster teamwork, motivate others, coach and develop, drive for results, show work commitment, act with integrity, demonstrate adaptability, champion change, build relationships, display organizational savvy, manage disagreement, foster open communication.

Feedback

Bar graphs, grids/plots, and narratives

Delivery Strategies: comparison to norms, highlighting largest self/rater discrepancies, item-level feedback, highlighting high/low items and scales, importance to job or success.

Follow up

Development and planning guides, workshop; post-assessment; vendor hotline.

Theory and Rationale

Based on several decades of experience and research of the work of Campbell, Dunnette, Lawlwe, and Weick (1970).

Administration

Takes approximately 30 minutes to complete. Scannable form is scored by the vendor. Licensing is also available and is cost effective if hundreds of tests are processed. Internet-based versions of the PROFILER are available for on-line data entry.

A 2-day certification process is available through PDI. The PROFILOR is sold only to approved or certified users.

Turnaround time, once all forms are received, is 5 to 7 business days.

Statistical Validation

Reliability: Internal consistency = .93-.64

Interrater = .61-.47

Validity: Content-related approach

Uses

Professional development.

Cost

The cost varies depending on volume, development suggestions, and other factors. The price includes 1 self and 10 respondent forms, scoring, and the Development Guide and Development Plan. Contact vendor for more information.

Prospector

Center for Creative Leadership
P.O. Box 26300
Greensboro, NC 27438-6300
Phone: 336-545-2810

Purpose

Helps managers and executives gain insight into their strengths and developmental needs along certain important dimensions.

Target Group

Individuals at all organizational levels and can be completed by a combination of supervisors, co-workers, peers, family members, and others.

Description

The PROSPECTOR consists of 48 items and 10 demographic questions.

Feedback

Bar graph.

Feedback delivery strategies: comparison to norms; item-level feedback.

Follow up

Development and planning guide; post-assessment; summary worksheets.

Theory and Rationale

Based on extensive research with international executives in a variety of global corporations, these dimensions reflect ability to learn, over the course of career, the skills important to effectiveness.

Administration

Can be completed in about 20 minutes. PROSPECTOR is returned to the vendor for computer-scoring. Turnaround time, once all materials are received by CCL, is one week.

Statistical Validation

Reliability: internal consistency .89-.76

Validity: examined in relationship to 5 criterion measures-executive potential, current performance, on-the-job learning, international criteria, and derailment potential.

Uses

Professional development.

200

Cost

Sold in sets starting at $195 per set. A set consists of 1 self-rating form, 10 rater forms, 1 feedback report, and 1 learning guide. Instruments are available at the following rates:

Quantity	Price Per Set	Administrative Price
1-50	$195	$175
51-200	$185	$165
201+	$175	$155

SMT Leader Survey

HRD Quarterly
2002 Renaissance Boulevard, Suite 100
King of Prussia, PA 19406

Purpose

Assessment of leadership behaviors.

Target Group

Team leaders, supervisors.

Description

THE SMT was developed to provide team leaders with insight into the leadership behaviors they use when interacting with their teams. Feedback may be received from team members, peers, and/or manager(s). The instrument consists of 36 statements that may describe the team leader's behavior. It measures 36 skills and abilities, which fall into 6 categories: communication, thinking skills, administration, leadership, interpersonal skills, and flexibility.

Feedback

Not included with review materials.

Follow up

Not included with review materials.

Theory and Rationale

Not included with review materials.

Administration

Self-administered. Self-scoring.

Statistical Validation

None reported.

Uses

Professional growth and development.

Cost

Contact publisher.

Situational Leadership II: Leadership Skills Assessment

Blanchard Training and Development
125 State Place
Escondido, CA 92029
Phone: 800-728-6000
FAX: 619-489-8407
www.blanchardtraining.com

Purpose

The purpose of this assessment instrument is to provide feedback to one's immediate supervisor or manager.

Target Group

Supervisors and managers.

Description

The SL-II offers situations in which users describe their manager's recent behavior and leadership skills. This tool is rated on a scale ranging from one, indicating never, to six, indicating always. Consist of 24 items.

Feedback

Not available with review materials.

Follow up

Not available with review materials.

Theory and Rationale

Not available with review materials.

Administration

Approximately 20 minutes to complete.

Statistical Validation

Not available with review materials.

Uses

Leadership development.

Cost

Contact Publisher.

Sixteen Personality Factors

Educational Testing Service
Cattell, R.B., et. al (Author)
Rosedale and Carter Roads
Princeton, NJ 08541
Phone: 609-734-5689

Purpose

Measures personality factors.

Target Group

Adults.

Description

The Sixteen Personality Factor Questionnaire: 5th Edition measures 16 primary personality factor scales as well as an Impression Management Index (IM), which assess social desirability. Changes in the fifth edition include: item content has been revised to reflect modern language usage, as well as eliminate cultural, racial, or gender; normative data has been updated to the 1990 US Census; new administrative indices have been designed to assess response bias;

Feedback

Not reported.

Follow up

Not reported.

Theory and Rationale

Not reported.

Administration

Self-administered; hand-scoring and computer scoring.

Statistical Validation

Evidence, but not reported.

Uses

Professional and personal development.

Cost

Contact publisher.

Skills and Attributes Inventory

Purpose

Assesses relative importance of 13 skill and attribute factors necessary for successful job performance and the degree to which the incumbent possesses the skills and attributes; used for systematic job analysis, test validation, and selection.

Target Group

Adults.

Description

Paper-pencil 96-item test measuring general functioning, intelligence, visual activity, visual and coordination skills, physical clerical skills, general clerical skills, graphic skills, leadership ability, tolerance in interpersonal relations, organization identification, conscientiousness and reliability, efficiency under stress, and solitary work.

Each item is rated on importance to the job, on a 4-point, equal-interval scale ranging from "little or none" to "outstanding". An ability form may also be used to assess the incumbent's strength in the relative skills and attributes.

Feedback

Not included in review materials.

Follow up

Not included in review materials.

Theory and Rationale

Not included in review materials.

Administration

Not included in review materials.

Statistical Validation

Not included in review materials.

Uses

Professional development.

Cost

Not included in review materials.

Styles of Leadership Survey

Telometrics International, Inc.

Purpose

Assesses individual leadership skills under a variety of conditions.

Target Group

Adults.

Description

The SLS is a self-assessment form comprising 12 items with three each assigned to one of four themes: Philosophy of Leadership; Planning and Goal Setting; Implementation; and, Performance and Evaluation. Participant rates five possible ways he/she reacts as a leader on a 10-point scale. In total respondents do 60 self-ratings.

Feedback

The basis for scoring and interpretation is the well-established Managerial Grid Model of Blake and Mouton (Concern for Purpose and Concern for People).

Follow up

Not included in review materials.

Theory and Rationale

Writings of Warren Bennis, Peter Drucker, and Tom Peters.

Administration

Self-administering and self-scoring.

Statistical Validation

Not reported in review materials.

Uses

To help persons who have undertaken supervisory roles to become more knowledgeable of real organizational issues. Used for examining leadership values.

Cost

$8.95 per inventory

Styles of Management Inventory

Telometrics International

Purpose

Assesses individual management style under a variety of conditions.

Target Group

Adults.

Description

The Inventory presents 12 management situations covering four categories: Philosophy of Management; Planning and Goal Setting; Implementation; and, Performance Evaluation. For each situation, five alternative ways of responding are presented. The respondent is asked to rank order these five responses on a 10-point scale ranging from completely characteristic to completely uncharacteristic of what he/she would do or feel.

Feedback

Test-testers provided with explanations of each of the dominant management styles, as well as information about how to interpret the difference scores.

Follow up

Training design reference guide.

Theory and Rationale

Based on Blake and Mouton's (1964) Managerial Grid.

Administration

Group. Self-administered. Untimed. Average time for taking inventory is approximately 2 hours.

Statistical Validation

Construct validity is good.

Uses

Used as a learning instrument for providing users with information about their dominant and backup styles of managing.

Cost

$6.95 per Inventory.

Superior Management Practices

Talico, Inc.
2320 S. Third Street
Jacksonville Beach, FL 32250

Purpose

Designed to differentiate superior middle managers and supervisors from others.

Target Group

Managers.

Description

Assists management is assessing the degree to which they use superior practices and to obtain feedback about their practices form subordinates, peers, and supervisors. This instrument contains 49 items and has seven clusters to describe management practices. They include action/innovation and problem solving; performance and productivity; contact and interaction; personnel communication and relationships; subordinate motivation and development; team orientation; leadership style and personal characteristics.

Feedback

Not included in review materials.

Follow up

Not included in review materials.

Theory and Rationale

Not included in review materials.

Administration

Not included in review materials.

Statistical Validation

Not included in review materials.

Uses

Not included in review materials.

Cost

Not included in review materials.

Supervisory Practices Survey

Talico, Inc.
2320 S. Third Street
Jacksonville Beach, FL 32250

Purpose

Assesses practices and attitudes.

Target Group

Adults.

Description

Used to measure those supervisory practices and attitudes that influence supervisory effectiveness and to provide a basis for supervisory development. It is a four-part instrument that focuses on current practices and attitudes of supervisors. Among the dimensions assessed are time management, motivation, communication, employee discipline, and performance management. Suitable for use with first-level supervisors and lower level middle managers. Contains 39 items.

Feedback

Not available with review materials.

Follow up

Not available with review materials.

Theory and Rationale

Not available with review materials.

Administration

Self-administered and self-scored. Takes approximately 30 minutes.

Statistical Validation

Not available with review materials.

Uses

Can be used for supervisory practices and skills assessment, training needs analysis and train evaluation.

Cost

Not available. Contact publisher.

Supervisory Skills Test

Talico, Inc.
2320 S. Third Street, Suite #5
Jacksonville Beach, FL 32250
www.talico.com
Phone: 904-642-0300
FAX: 904-642-7004

Purpose

To evaluate the cognitive skills of manager, supervisors and /or candidates for those positions.

Target Group

Managers, supervisors. Suitable for first level supervision through middle management.

Description

The 48-item, easy-to-administer and easy-to-score test covers all of the essential responsibilities of first and second level superiors; form basic planning and organizing to interaction with subordinates, superiors and peers.

Measures what supervisors believe, know, and understand about the functions, practices, behaviors, and skills that are required for successful supervisory performance.

Twelve management and supervisory skill dimensions are evaluated. Useful for training needs analysis, management and supervisory training, and career counseling and development. Subtests include: Planning and Organizing; Communication; Complaint: Handling; Coaching and Counseling; Employee Discipline; Motivation; Training; Human Behavior; Teamwork;' Leadership; Time Management; Problem Solving.

Feedback

Not included in review materials.

Follow up

Not included in review materials.

Theory and Rationale

Not included in review materials.

Administration

Available as paper and pencil exercise and on an IBM compatible computer.

Statistical Validation

Not included in review materials.

Uses

Professional and leadership development.

Cost

Set costs $89.95

Supervisory Styles Inventory

Talico, Inc.
2320 S. Third Street
Jacksonville Beach, FL 32250
www.talico.com

Purpose

To help managers and supervisors assess and critique their leadership style.

Target Group

First and second level supervisors and middle-level managers.

Description

The 20-item inventory was developed to evaluate whether a manager or supervisor prefers people-centered or task-centered leadership. The following supervisory skills are assessed: communication, leadership, motivation, problem solving, and organizational skills.

Feedback

Not included in review materials.

Follow up

Not included in review materials.

Theory and Rationale

Based on Blake and Mouton's styles of leadership.

Administration

Takes 30 minutes to complete. Self-administered and self-scored.

Statistical Validation

Not included in review materials.

Uses

Used for leadership development, self/professional/career development, human relations training, performance appraisal, coaching and counseling, management, and supervisory training.

Cost

Not reported. Contact publisher.

Survey of Educational Leadership Practices

Educational Testing Service
Nelson, C.W. & Valenti, J.J. (Author)
Rosedale and Carter Roads
Princeton, NJ 08541
Phone: 609-734-5689

For more detailed information about this measure and its related materials, please contact or consult:

Dr Charles W. Nelson
14 Hill Drive
Dune Acres
Chesterton, IN

Survey of Executive Leadership

The Clark Wilson Group, Inc.
1320 Fenwick Lane
Suite 708
Silver Spring, MD 20910
Phone: 800-537-7249
FAX: 301-495-5842
www.cwginc.com

Purpose

EXEC provides feedback to top-level executives on dimension such as dealing with higher-level organizational complexities and maintaining a perspective on the marketplace. The top management job is viewed for the broad perspective of the total organization.

Target Group

EXEC is for top management – the CEO, president, executive director, board of directors, and senior vice presidents. Raters are the executive's peers, boss, and direct reports.

Description

EXEC consists of 84 items and 3 open-ended questions.

Feedback

Line graph and narrative.

Comparison to norms; highlighting largest self/rater discrepancies; item-level feedback; comparison to ideal; important to job or success.

Follow up

Development and planning guides; post-assessment; vendor hotline.

Theory and Rationale

Drawn from Task-Cycle Theory and cognitive-learning theory.

Administration

Can be completed in 25-30 minutes. Open architecture allows addition of items at client's request.

The distributors provide computer-scoring services. Turnaround time is 5 working days for 300-500 questionnaires.

Statistical Validation

Reliabilities range from .71 to .87

Uses

Leadership development.

Cost

EXEC is sold through regional distributors to consultants and end-users. End-user prices are $20 per survey to purchase and $7 to $9 per survey for scoring (volume discounts apply).

Composite Reports are $65 each.

Survey of Leadership Practices

The Clark Wilson Group, Inc.
1320 Fenwick Lane
Suite 708
Silver Spring, MD 20910
Phone: 800-537-7249
FAX: 301-495-5842
www.cwginc.com

Purpose

The SLP is a multi-rater assessment designed to give organizational leaders feedback on their efforts to move the organization toward positive change.

Target Group

Organizational leaders, including middle and senior managers, project leaders, and professional people who must build support for their innovations.

Description

The SLP contains 85 items on 7-point Likert-type scale and 3 open-ended questions focusing on what the leader should continue doing, stop doing, and do to become more effective.

It is a 360-degree analysis based on the concept of six "task cycle" skills required for bringing change to organizations: Vision, Risk taking, Organizational sensitivity, Encouraging participation, Teaming, Persuasiveness, Feedback, Energy, Perseverance, Sharing credit, Effectiveness, Coping with stress, Trustworthiness, Source of power

Feedback

Participants receive verbal, graphic, and numerical feedback and interpretations for each of the task cycle skills.

Follow up

The narrative feedback report includes brief advice for development. A resource guide providing more extensive development assistance is also available.

Theory and Rationale

Well-constructed instrument with good representation in the literature. Based on the idea that leadership depends on skill in accomplishing a sequenced series of tasks, beginning with vision and concluding with recognition of performance. Skill on these tasks will be related to the leader's perceived effectiveness.

Administration

Completed in 25-30 minutes (open architecture); Self-scored, vender, and self-score software. Certification is required to administer the survey and provide feedback.

Statistical Validation

Effectiveness scale serves as validity measure (see p. 275 of instrument description) Internal Consistency – *Cronbach's alpha* (.67 - .93)
Interrater Reliability (.78 - .96)

Uses

Most appropriate for professional development.

Cost

Each survey is $21 which includes scoring and feedback report. Quantity discounts are available.

Survey of Management Practices

The Clark Wilson Group, Inc.
1320 Fenwick Lane
Suite 708
Silver Spring, MD 20910
Phone: 800-537-7249
FAX: 301-495-5842
www.cwginc.com

Purpose

The SMP is a multi-rater assessment designed to give organizational leaders feedback on their management skills and practices.

Target Group

Supervisors or others responsible for day-to-day activities of an organization.

Description

The inventory contains145 items on a 7-point Likert scale, ranging from 1 ("never or to a small extent") to 7 ("always or to a great extent"). It focuses on Clarity of goals and objectives, Planning, Problem solving, Facilitating work of others, Exercising positive control, Approachability, Teambuilding, Interested in subordinates' growth, Work involvement, Opportunity for growth. (open architecture). 360-degree analysis

Feedback

Participants receive verbal, graphic, and numerical feedback and interpretation for each of the task cycle skills, interpersonal relations, and group motivation and morale. The report shows summary scores for each category, as well as item-by-item breakouts. Self ratings are compared with those of supervisors, peers, and subordinates. Summary scores include percentile ratings based on a large sample of managers.

Follow up

The narrative feedback report includes brief advice for development. A resource guide providing more extensive development assistance is also available.

Theory and Rationale

The SMP is based on the idea that effective management depends on skill in accomplishing a sequenced series of tasks, beginning with goal-setting and concluding with recognition for good performance. The SMP assumes that effective managers are those who balance structure with consideration.

Administration
Self-scored, vender, and self-score software. The SMP may be completed in 25-30 minutes. Certification is required to administer the survey.

Statistical Validation
High degree of construct validity (.91). Internal Consistency Cronbach's alpha (.77 - .98). Interrater reliability (90 - .93)

Uses
Most appropriate for professional development.

Cost
$21 per survey, including scoring and feedback report

Team Leader Skills Assessment

Talico, Inc.
2320 S. Third Street
Jacksonville Beach, FL 32250
www.talico.com

Purpose

Assesses characteristics of team builders.

Target Group

Adults.

Description

The Team Leaders Skills Assessment (TLSA) is a self-assessment instrument that measures the extent to which the respondent engages in eight sets of practices that are characteristic of superior team builders. The assessment consists of 16 forced choice pairs of items and

Feedback

The instrument provides managers and team leaders with feedback on the extent to which they engage in these characteristic behaviors and also provides them with self-assessment information that will help them improve their team building skills.

Follow up

Not included in review materials.

Theory and Rationale

Not included in review materials.

Administration

Requires 15 to 20 minutes for administration.
Self-administered and self-scored.

Statistical Validation

Not included in review materials.

Uses

Team building development.

Cost

Not included in review materials. Contact publisher.

Team Performance Questionnaire-

Pfeiffer& Company International Publishers, Inc.
8517 Production Avenue
San Diego, CA 92121-2280

Purpose

Measures six characteristics of high-performing teams.

Target Group

Adults.

Description

The TPQ measures six characteristics of high-performing teams. These are: goals and Results; Collaboration and Involvement; Competencies; Communication Processes; Emotional Climate; and, Leadership. The purposes of the questionnaire are to : link team behavior to measurable performance; provide the team leader and team members with information about their work group characteristics, and to enable a team to identify opportunities for improvement.

It consists of 32 questions rated on a Likert-type scale.

Feedback

Not included in review materials.

Follow up

Not included in review materials.

Theory and Rationale

Not included in review materials.

Administration

Self-administered and self-scored.

Statistical Validation

Not included in review materials.

Uses

Team performance development.

Cost

Not included in review materials. Contact publisher.

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(Specific Document)

TM035275

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Title: Aligning Assessment Instruments with the Sterling Quality Criteria: Technical Report for the Teaching and Leadership Center at Florida Atlantic University

Author(s): John Pisapia and Eleni Coukos-Semmel

Corporate Source: Florida Atlantic University

Publication Date: December 2002

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